United States
Department of
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Foreign
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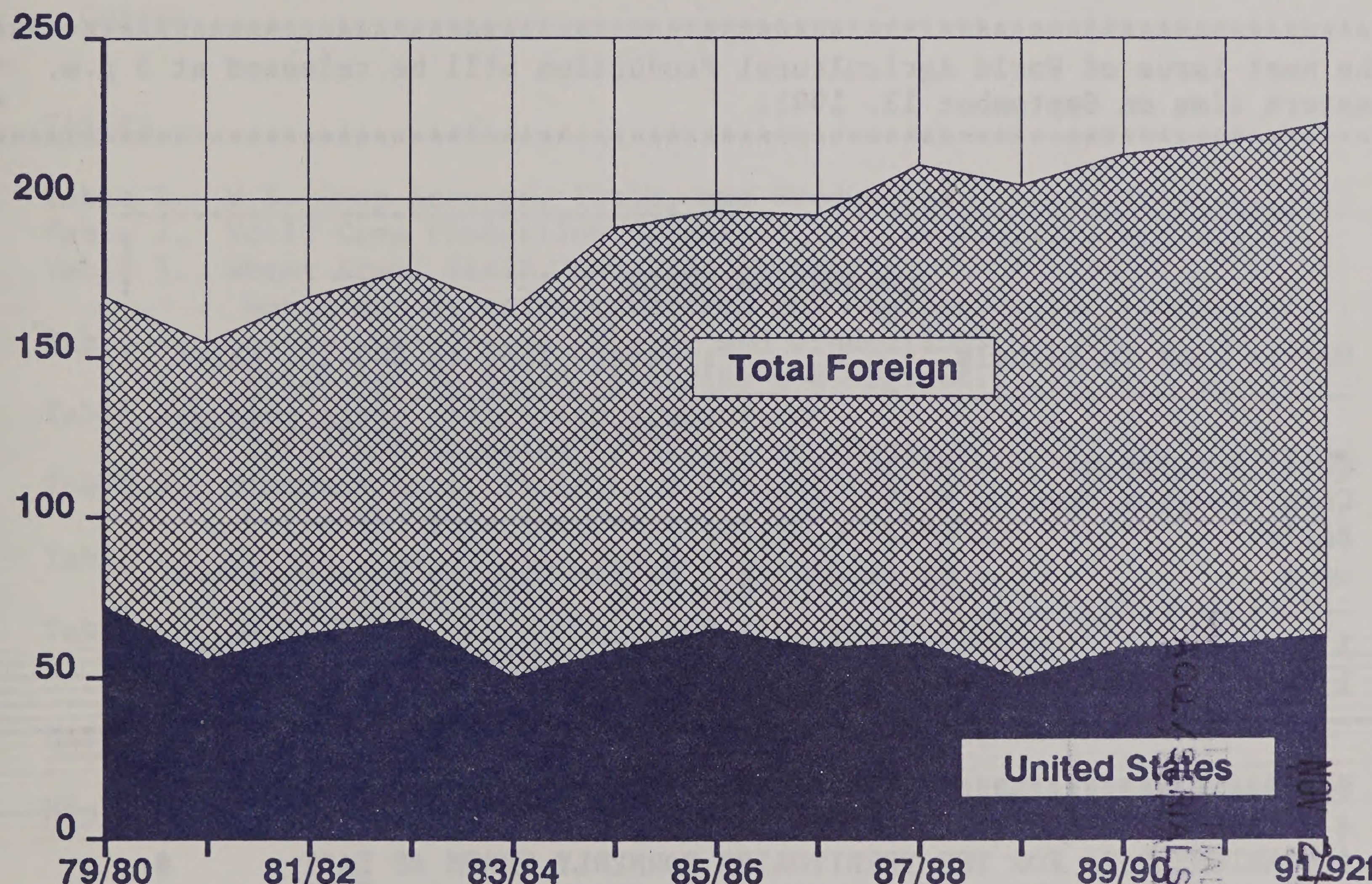
WAP 8-91
August 1991

World Agricultural Production

World Oilseeds Production

Million Metric Tons



Production Articles This Month...

- World Oilseeds
- EC Oilseeds
- World Poultry
- Chinese Cotton
- Canadian Wheat and Rapeseed

Approved by the World Agricultural Outlook Board - USDA

This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. Text and numbers in this report are based on unrounded data and detail may not add to totals because of rounding. This report reflects official USDA estimates released in World Agricultural Supply and Demand Estimates (WASDE-257), August 12, 1991.

This report was prepared by the Production Estimates and Crop Assessment Division (PECAD), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 382-8888 or by FAX (202) 447-7729.

The next issue of World Agricultural Production will be released at 3 p.m. eastern time on September 13, 1991.

CONVERSION TABLE

Metric Tons to Bushels		Metric Tons to 480-lb. Bales	
		Cotton	= MT*4.592917
Wheat & Soybeans	= MT*36.7437		
Corn, Sorghum, Rye	= MT*39.36825		
Barley	= MT*45.929625		
Oats	= MT*68.894438	**Metric Tons to Hundredweight**	
1 hectare	= 2.471044 acres	Rice	=MT*22.04622
1 kilogram	= 2.204622 pounds		

NOTE: BEGINNING WITH THE MAY EDITION, THIS CIRCULAR SERIES COMBINES DATA FOR THE TERRITORIES FORMERLY KNOWN AS EAST GERMANY (GDR) AND WEST GERMANY (FRG) UNDER THE HEADING GERMANY. LIKEWISE, DATA FOR THE TERRITORY FORMERLY CALLED EAST GERMANY (GDR) ARE INCLUDED IN AGGREGATES FOR THE EUROPEAN COMMUNITY (EC-12) AND EXCLUDED FROM AGGREGATES FOR EASTERN EUROPE. BECAUSE OF THIS, DATA FOR "GERMANY", EASTERN EUROPE, AND THE EUROPEAN COMMUNITY (EC-12) ARE NOT COMPARABLE WITH DATA PUBLISHED IN PRIOR EDITIONS OF THIS CIRCULAR SERIES AND MAY NOT BE COMPARABLE WITH SUCH ESTIMATES FOUND IN OTHER PUBLICATIONS OF THE U.S. DEPARTMENT OF AGRICULTURE.

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PRODUCTION HIGHLIGHTS FOR 1991/92

August 1991

WHEAT: World production for 1991/92 is estimated at 550.5 million tons, down 5.6 million or 1 percent from last month, and down 7 percent from last year. Total foreign production is estimated at 495.2 million tons, down 5.7 million or 1 percent from last month and down 4 percent from last year. Country highlights are as follows:

- o **United States** — Production is forecast at 55.3 million tons, virtually unchanged from last month, but down 26 percent from last year.

- o **Soviet Union** — Production is projected at 85.5 million tons, down 6.5 million or 7 percent from last month, and down 21 percent from last year. Conditions remain unfavorable for much of the spring grains areas and harvest reports indicate lower-than-expected winter grain yields.

- o **China** — Production is projected at 94 million tons, down 1.0 million or 1 percent from last month, and down 4 percent from last year. Although many provinces in the North China Plain reported record or near-record winter wheat output, total production is expected to decline because of severe flooding in central China and lower planted area to spring wheat.

- o **Argentina** — Production is projected at 9.0 million tons, down 1.0 million tons or 10 percent from last month, and down 18 percent from 1990/91. Estimated area was reduced by 17 percent from last month's level due to planting delays and low prices.

- o **Brazil** — Production is projected at 3.2 million tons, down 0.8 million or 20 percent from last month, but unchanged from 1990/91. Planting of the 1991/92 crop is nearly complete, and indications are that planted area is down significantly from last year. In addition to the reduced area, cash-strapped farmers have lowered input use which may affect yields.

- o **Canada** — Production is projected at 31.0 million tons, up 2.0 million or 7 percent from last month, but down 2 percent from last year's record harvest. Widespread favorable weather throughout the growing season increased yield potential.

- o **Iran** — Production is projected at 7.1 million tons, up 0.7 million or 11 percent from last month, and up 1 percent from last year. The increase is attributed to higher estimated yield.

- **Eastern Europe** Production is projected at 39.4 million tons, up 0.4 million or 1 percent from last month, but down 4 percent from last year's record harvest. Higher guaranteed prices in Yugoslavia resulted in increased area and input usage.

- **EC-12** Production is projected at 89.0 million tons, up 0.2 million or marginally from last month and up 5 percent from last year. Favorable weather in the United Kingdom increased yield prospects.

- **Tunisia** Production is projected at 1.5 million tons, up 0.2 million or 17 percent from last month, and up 35 percent from 1990/91. Increased durum planted area and record estimated yields due to favorable weather are the reasons for the increase.

COARSE GRAINS: World production for 1991/92 is estimated at 798.6 million tons, down 29.4 million or 4 percent from last month, and down 3 percent from last year. Total foreign production is estimated at 581.6 million tons, down 5.5 million or 1 percent from last month, and down 3 percent from last year. Country highlights are as follows:

- **United States** Production is forecast at 217.1 million tons, down 23.9 million or 10 percent from last month, and down 6 percent from last year. Unfavorable weather conditions reduced forecast yields for corn, sorghum, and oats.

- **Soviet Union** Production is projected at 91.5 million tons, down 8 million or 8 percent from last month, and down 19 percent from last year. Hot, dry conditions in the spring grains areas reduced prospects for coarse grains. Also, corn area was adjusted downward and continued dryness in the European USSR will likely reduce yields.

- **India** Production is projected at 32.5 million tons, down 0.5 million or 2 percent from last month, and 7 percent below last year's record harvest. Deficient rainfall in key rainfed growing regions of north India have significantly decreased corn area and yield prospects. Millet yields also are forecast to decline because of a lack of timely rainfall and heat stress. Sorghum yields are forecast higher due to excellent moisture conditions in central India.

- **Canada** Production is projected at 25.9 million tons, up 1.5 million or 6 percent from last month, but down 3 percent from last year. Favorable weather throughout the growing season increased yield potential for barley.

TABLE 4

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1989/90	Prel. 1990/91	Proj. 1991/92	1989/90	Prel. 1990/91	1991/92 Proj. July	1991/92 Proj. Aug.	1989/90	Prel. 1990/91	1991/92 Proj. July	1991/92 Proj. Aug.
CORN	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	126.1	127.0	129.8	3.65	3.70		3.62	460.7	470.4	493.4	469.4
United States	26.2	27.1	27.8	7.30	7.44		6.77	191.2	201.5	210.2	188.4
Total Foreign	99.9	99.9	102.0	2.70	2.69	2.76	2.76	269.6	268.9	283.2	281.0
Maj. Foreign Exporters	6.7	6.4	6.9	2.72	2.89	2.75	2.75	18.2	18.5	19.0	19.0
Argentina	1.7	2.0	2.2	3.06	4.00	3.27	3.27	5.2	7.8	7.2	7.2
South Africa	3.6	3.1	3.4	2.47	2.26	2.35	2.35	8.9	7.0	8.0	8.0
Thailand	1.4	1.4	1.3	2.93	2.74	2.88	2.88	4.1	3.7	3.8	3.8
Major Importers	21.2	19.6	21.4	3.93	3.51	3.89	3.90	83.3	68.9	85.2	83.5
Eastern Europe	7.1	6.4	6.6	4.14	3.29	4.29	4.29	29.2	21.1	28.3	28.3
EC-12	3.9	3.5	4.0	6.91	6.24	7.07	7.07	26.9	21.7	28.3	28.3
Other W. Europe	0.2	0.2	0.2	7.68	7.91	7.88	7.88	1.7	1.8	1.7	1.7
Mexico	5.8	6.6	7.0	1.68	2.14	1.71	1.83	9.8	14.1	12.0	12.8
USSR	4.1	2.8	3.5	3.71	3.50	3.63	3.43	15.3	9.8	14.5	12.0
Other Maj. Import. 2/	0.1	0.1	0.1	4.28	4.10	4.18	4.18	0.5	0.5	0.5	0.5
Other Foreign	72.0	73.9	73.6	2.33	2.46	2.42	2.42	168.0	181.5	178.9	178.4
Brazil	12.1	13.0	13.0	1.80	1.81	2.00	2.00	21.8	23.5	26.0	26.0
Canada	1.0	1.0	1.1	6.36	7.16	6.00	6.00	6.4	7.2	6.6	6.6
China	20.4	21.4	20.6	3.88	4.21	4.08	4.08	78.9	90.0	84.0	84.0
Egypt	0.8	0.8	0.9	5.37	5.43	5.59	5.59	4.5	4.6	4.8	4.8
India	5.9	5.9	5.7	1.61	1.61	1.53	1.49	9.4	9.5	9.0	8.5
Indonesia	2.7	2.9	3.1	1.85	1.83	1.84	1.84	5.0	5.3	5.6	5.6
Philippines	3.6	3.8	3.9	1.24	1.24	1.24	1.24	4.5	4.7	4.9	4.9
Zimbabwe	1.2	1.1	1.2	1.72	1.45	1.67	1.67	2.0	1.6	2.0	2.0
Others	24.4	24.0	24.2	1.46	1.47	1.49	1.49	35.5	35.2	36.1	36.1
SORGHUM											
World	40.6	39.6	39.9	1.35	1.34		1.33	54.8	53.2	54.3	53.1
United States	4.5	3.7	3.9	3.48	3.95		3.64	15.6	14.5	16.0	14.3
Total Foreign	36.1	35.9	36.0	1.08	1.08	1.07	1.08	39.1	38.7	38.3	38.8
Argentina	0.7	0.7	0.7	2.86	3.57	2.86	2.86	2.0	2.5	2.0	2.0
Australia	0.4	0.5	0.5	2.27	1.95	2.00	2.00	0.9	0.9	1.0	1.0
China	1.6	1.6	1.6	2.72	3.35	3.17	3.17	4.4	5.2	5.0	5.0
India	14.9	15.0	15.0	0.86	0.83	0.80	0.83	12.9	12.5	12.0	12.5
Mexico	1.3	1.3	1.2	2.88	2.85	2.92	2.92	3.8	3.7	3.5	3.5
Nigeria	4.4	4.4	4.4	0.80	0.64	0.80	0.80	3.5	2.8	3.5	3.5
South Africa	0.2	0.2	0.2	1.11	1.12	1.11	1.11	0.3	0.2	0.3	0.3
Sudan	3.1	3.0	3.0	0.52	0.50	0.50	0.50	1.6	1.5	1.5	1.5
Thailand	0.2	0.2	0.2	1.44	1.39	1.47	1.47	0.2	0.3	0.3	0.3
Others	9.2	9.1	9.2	1.03	1.00	1.01	1.01	9.5	9.1	9.3	9.3

FOOTNOTES AT END OF TABLE

TABLE 4

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1989/90	Prel. 1990/91	Proj. 1991/92	1989/90	Prel. 1990/91	1991/92 Proj. July	1991/92 Proj. Aug.	1989/90	Prel. 1990/91	1991/92 Proj. July	1991/92 Proj. Aug.
OATS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	22.7	21.7	21.1	1.84	1.98		1.79	41.9	43.0	39.0	37.8
United States	2.8	2.4	2.0	1.95	2.16		1.87	5.4	5.2	4.1	3.8
Total Foreign	19.9	19.3	19.1	1.83	1.96	1.84	1.78	36.4	37.8	35.0	34.0
USSR	10.8	10.7	10.5	1.57	1.68	1.52	1.43	16.8	18.0	16.0	15.0
Maj. Foreign Exporters	3.7	3.3	3.4	1.97	2.14	2.10	2.10	7.3	7.2	7.2	7.2
Argentina	0.4	0.3	0.4	1.44	1.34	1.29	1.29	0.6	0.4	0.5	0.5
Australia	1.1	1.2	1.3	1.44	1.42	1.38	1.38	1.6	1.6	1.8	1.8
Canada	1.7	1.5	1.4	2.08	2.33	2.44	2.44	3.5	3.5	3.3	3.3
Sweden	0.4	0.4	0.4	3.54	4.42	3.86	3.86	1.5	1.6	1.6	1.6
Other Foreign	5.5	5.3	5.1	2.24	2.40	2.30	2.30	12.3	12.6	11.8	11.8
China	0.6	0.6	0.6	1.20	1.21	1.18	1.18	0.7	0.7	0.7	0.7
Eastern Europe	1.2	1.2	1.2	2.55	2.70	2.56	2.56	3.2	3.3	3.0	3.0
Czechoslovakia	0.1	0.1	0.1	3.24	4.55	4.00	4.00	0.3	0.4	0.4	0.4
Poland	0.8	0.7	0.7	2.72	2.84	2.70	2.70	2.2	2.1	1.9	1.9
EC-12	1.9	1.6	1.6	2.82	3.07	3.02	3.02	5.2	5.1	4.9	4.9
France	0.3	0.2	0.2	3.73	3.86	3.81	3.81	1.0	0.9	0.8	0.8
Germany	0.7	0.6	0.5	3.68	3.93	4.44	4.44	2.4	2.4	2.4	2.4
Finland	0.4	0.5	0.4	3.24	3.67	3.28	3.28	1.4	1.7	1.3	1.3
Norway	0.1	0.1	0.1	3.13	4.58	4.00	4.00	0.4	0.6	0.5	0.5
Others	1.3	1.2	1.2	1.12	1.09	1.11	1.11	1.4	1.4	1.4	1.4
RYE											
World	16.9	16.7	13.5	2.22	2.32		2.22	37.6	38.8	30.6	30.1
United States	0.2	0.2	0.2	1.77	1.70		1.73	0.3	0.3	0.3	0.3
Total Foreign	16.7	16.6	13.4	2.23	2.33	2.27	2.23	37.3	38.6	30.3	29.8
USSR	10.7	10.4	8.0	1.87	2.02	1.81	1.75	20.1	21.0	14.5	14.0
Maj. Foreign Exporter											
Canada	0.5	0.5	0.3	1.74	1.65	1.69	1.69	0.9	0.9	0.5	0.5
Other Foreign											
Eastern Europe	3.3	3.4	3.4	2.94	2.88	2.85	2.85	9.7	9.9	9.6	9.6
Hungary	0.1	0.1	0.1	2.06	2.46	2.22	2.22	0.2	0.2	0.2	0.2
Poland	2.9	3.1	3.0	2.95	2.86	2.85	2.85	8.6	8.8	8.6	8.6
Czechoslovakia	0.2	0.2	0.2	4.05	4.26	3.82	3.82	0.7	0.7	0.7	0.7
EC-12	1.6	1.6	1.2	3.33	3.35	3.83	3.83	5.3	5.3	4.7	4.7
Denmark	0.1	0.1	0.1	4.82	4.95	4.84	4.84	0.5	0.5	0.5	0.5
Germany	1.0	1.1	0.7	3.86	3.78	4.93	4.93	3.9	4.0	3.5	3.5
Others	0.6	0.6	0.5	2.29	2.38	2.17	2.17	1.3	1.5	1.0	1.0

1/ Total of barley, corn, sorghum, oats, and rye shown below, plus millet and mixed grain.
2/ Japan, Republic of Korea, and Taiwan.

TABLE 5

Rice Area, Yield, and Production
World and Selected Countries and Regions

	AREA			YIELD				PRODUCTION (Rough Basis)				MILLING RATE				PRODUCTION (Milled Basis)			
	1989/90	Prel. 1990/91	Proj. 1991/92	1989/90	Prel. 1990/91	1991/92 Proj. July	1991/92 Proj. August	1989/90	Prel. 1990/91	1991/92 Proj. July	1991/92 Proj. August	1989/90	Prel. 1990/91	1991/92 Proj. July	1991/92 Proj. August	1989/90	Prel. 1990/91	1991/92 Proj. July	1991/92 Proj. August
	—Million Hectares—			—Metric Tons Per Hectare—				—Million Metric Tons—				—In Percent—				—Million Metric Tons—			
World	146.6	147.0	147.2	3.5	3.5		3.5	508.1	514.3	512.3	508.6	67.7	67.7	67.7	67.7	344.0	348.3	344.2	344.2
United States	1.1	1.1	1.1	6.4	6.2		6.2	7.0	7.0	7.1	7.1	73.0	73.0	70.0	70.0	5.1	5.1	5.0	5.0
Total Foreign	145.5	145.9	146.1	3.4	3.5	3.5	3.4	501.1	507.2	505.2	501.5	67.6	67.7	67.2	67.5	338.9	343.2	339.2	339.3
Maj. Foreign Exporters	16.8	16.5	16.8	2.3	2.2	2.3	2.3	38.5	35.7	38.2	38.2	64.0	63.8	64.0	64.0	24.6	22.8	24.4	24.4
Burma	4.7	4.8	4.7	2.9	2.9	2.9	2.9	13.5	13.7	13.4	13.4	60.0	60.0	60.0	60.0	8.1	8.2	8.0	8.0
Pakistan	2.1	2.0	2.1	2.3	2.3	2.3	2.3	4.8	4.7	4.8	4.8	66.7	66.7	66.7	66.7	3.2	3.1	3.2	3.2
Thailand	10.0	9.7	10.0	2.0	1.8	2.0	2.0	20.2	17.3	20.0	20.0	66.0	66.0	66.0	66.0	13.3	11.4	13.2	13.2
Major Importers	13.9	13.9	13.7	4.2	4.2	4.2	4.2	58.6	58.4	58.0	57.7	66.1	66.0	66.1	66.1	38.8	38.5	38.3	38.1
EC-12	0.3	0.4	0.4	6.2	6.4	6.0	6.0	2.1	2.4	2.3	2.3	67.0	67.4	67.4	67.4	1.4	1.6	1.5	1.5
Indonesia	10.5	10.5	10.3	4.2	4.3	4.3	4.3	44.7	45.2	44.6	44.5	65.0	65.0	65.0	65.0	29.1	29.4	29.0	28.9
Nigeria	0.6	0.7	0.7	1.4	1.4	1.4	1.4	0.9	0.9	0.9	0.9	60.0	60.0	60.0	60.0	0.5	0.6	0.6	0.6
Republic of Korea	1.3	1.2	1.2	6.4	6.2	6.4	6.4	8.1	7.7	7.8	7.8	72.8	72.6	72.7	72.7	5.9	5.6	5.7	5.7
Other Maj. Import. 1/	1.2	1.1	1.1	2.4	1.9	2.3	2.0	2.8	2.2	2.3	2.2	65.9	65.4	65.4	65.7	1.9	1.4	1.5	1.5
Other Foreign	114.8	115.5	115.6	3.5	3.6	3.5	3.5	404.0	413.2	405.4	405.6	68.2	68.2	68.2	68.2	275.5	281.9	276.5	276.7
Australia	0.1	0.1	0.1	8.0	8.6	7.9	7.9	0.9	0.8	0.9	0.9	71.5	71.5	71.5	71.5	0.7	0.5	0.6	0.6
Bangladesh	10.5	10.4	10.5	2.6	2.6	2.5	2.6	26.8	26.9	27.0	27.6	66.7	66.7	66.7	66.7	17.9	17.9	18.0	18.4
Brazil	4.3	4.5	5.3	1.7	2.1	1.9	1.9	7.2	9.3	10.0	10.0	68.0	68.0	68.0	68.0	4.9	6.3	6.8	6.8
China	32.7	33.1	32.6	5.5	5.6	5.5	5.5	180.1	185.0	180.0	180.0	70.0	70.0	70.0	70.0	126.1	129.5	126.0	126.0
India	42.2	42.2	42.0	2.6	2.7	2.6	2.6	111.1	112.5	109.5	109.5	66.7	66.7	66.7	66.7	74.1	75.0	73.0	73.0
Japan	2.1	2.1	2.1	6.2	6.3	6.2	6.2	12.9	13.1	12.9	12.9	72.8	72.8	72.8	72.8	9.4	9.6	9.4	9.4
Philippines	3.4	3.5	3.6	2.6	2.7	2.6	2.6	8.9	9.4	9.5	9.5	65.0	65.0	65.0	65.0	5.8	6.1	6.2	6.2
USSR	0.7	0.6	0.7	3.9	4.0	4.0	4.0	2.6	2.4	2.6	2.6	65.0	65.0	65.0	65.0	1.7	1.6	1.7	1.7
Vietnam	5.9	5.9	5.8	3.1	3.1	3.0	3.0	18.4	18.0	17.5	17.5	65.0	65.0	65.0	65.0	12.0	11.7	11.4	11.4
Others	12.9	13.2	13.0	2.7	2.7	2.7	2.7	35.0	35.8	35.4	35.1	66.1	66.2	66.1	66.1	23.2	23.7	23.4	23.2

1/ Hong Kong, Iran, Iraq, Ivory Coast, and Saudi Arabia.

AUGUST 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 6

Oilseeds Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	July	Aug.	1989/90	1990/91	July	Aug.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SOYBEANS											
World	58.26	54.05	55.94	1.84	1.91		1.86	107.27	103.39	107.01	104.22
United States	24.09	22.87	23.77	2.17	2.29		2.14	52.35	52.30	53.62	50.86
Total Foreign	34.16	31.19	32.17	1.61	1.64	1.66	1.66	54.92	51.09	53.40	53.36
Maj. Foreign Exporters	16.35	14.40	15.00	1.90	1.83	1.88	1.88	31.09	26.30	28.25	28.25
Argentina	4.95	4.75	5.00	2.17	2.27	2.15	2.15	10.75	10.80	10.75	10.75
Brazil	11.40	9.65	10.00	1.78	1.61	1.75	1.75	20.34	15.50	17.50	17.50
Other Foreign	17.81	16.79	17.17	1.34	1.48	1.46	1.46	23.83	24.79	25.15	25.11
Canada	0.54	0.49	0.58	2.26	2.64	2.33	2.33	1.22	1.29	1.35	1.35
China	8.06	7.60	7.95	1.27	1.50	1.45	1.45	10.23	11.40	11.50	11.50
Eastern Europe	0.70	0.36	0.28	0.97	1.07	1.30	1.30	0.68	0.39	0.36	0.36
EC-12	0.63	0.69	0.58	3.13	3.12	3.14	3.14	1.98	2.17	1.81	1.81
India	2.13	2.30	2.40	0.80	1.04	1.00	1.00	1.72	2.40	2.40	2.40
Indonesia	1.21	1.24	1.26	1.09	1.09	1.11	1.11	1.32	1.35	1.40	1.40
Paraguay	0.98	0.89	0.90	1.61	1.46	1.78	1.78	1.58	1.30	1.60	1.60
USSR	0.83	0.83	0.81	1.15	1.06	1.14	1.14	0.96	0.88	0.96	0.92
Others	2.74	2.39	2.42	1.52	1.51	1.56	1.56	4.17	3.61	3.77	3.77
COTTONSEED											
World	32.06	33.52	34.90	0.96	1.00		1.00	30.92	33.53	35.07	34.87
United States	3.86	4.75	5.44	1.10	1.14		1.14	4.24	5.41	5.76	6.19
Total Foreign	28.20	28.77	29.46	0.95	0.98	0.99	0.97	26.68	28.11	29.31	28.68
China	5.20	5.59	6.00	1.24	1.37	1.39	1.36	6.44	7.66	8.50	8.16
India	7.33	7.60	7.80	0.60	0.53	0.54	0.54	4.40	4.00	4.20	4.20
Pakistan	2.60	2.69	2.78	1.12	1.21	1.23	1.23	2.91	3.27	3.40	3.40
USSR	3.33	3.15	3.00	1.53	1.56	1.56	1.53	5.11	4.92	4.93	4.60
Others	9.74	9.74	9.89	0.80	0.85	0.84	0.84	7.82	8.26	8.29	8.32
PEANUTS											
World	19.82	19.52	19.92	1.11	1.13		1.14	22.06	22.12	22.52	22.69
United States	0.67	0.73	0.80	2.72	2.23		2.91	1.81	1.63	2.14	2.31
Total Foreign	19.16	18.79	19.12	1.06	1.09	1.07	1.07	20.25	20.48	20.38	20.38
Argentina	0.18	0.20	0.19	1.87	2.37	2.11	2.11	0.34	0.48	0.40	0.40
China	2.96	2.96	3.02	1.81	2.15	1.92	1.92	5.37	6.37	5.80	5.80
India	8.71	8.10	8.30	0.93	0.90	0.92	0.92	8.09	7.30	7.60	7.60
Senegal	0.78	0.92	0.90	1.04	0.73	0.77	0.77	0.82	0.67	0.70	0.70
South Africa	0.09	0.09	0.09	1.28	1.59	1.50	1.50	0.11	0.14	0.14	0.14
Sudan	0.55	0.54	0.53	0.73	0.60	0.75	0.75	0.40	0.33	0.40	0.40
Others	5.89	5.99	6.09	0.87	0.87	0.88	0.88	5.13	5.21	5.35	5.35

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TABLE 6

Oilseeds Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA 1989/90	AREA Prel. 1990/91	AREA Proj. 1991/92	YIELD 1989/90	YIELD Prel. 1990/91	YIELD 1991/92 Proj. July	YIELD 1991/92 Proj. Aug.	PRODUCTION 1989/90	PRODUCTION Prel. 1990/91	PRODUCTION 1991/92 Proj. July	PRODUCTION 1991/92 Proj. Aug.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SUNFLOWERSEED											
World	15.88	15.92	15.77	1.38	1.38		1.36	21.87	22.01	21.60	21.43
United States	0.72	0.75	1.03	1.10	1.38		1.50	0.80	1.03	1.52	1.54
Total Foreign	15.16	15.17	14.74	1.39	1.38	1.35	1.35	21.07	20.98	20.09	19.89
Argentina	2.80	2.30	2.50	1.36	1.70	1.40	1.40	3.80	3.90	3.50	3.50
China	0.72	0.70	0.71	1.49	1.71	1.62	1.62	1.06	1.20	1.15	1.15
EC-12	2.12	2.55	2.25	1.67	1.61	1.66	1.66	3.54	4.09	3.75	3.75
East Europe	1.27	1.23	1.17	1.81	1.70	1.77	1.77	2.29	2.09	2.08	2.08
USSR	4.46	4.67	4.60	1.59	1.41	1.45	1.43	7.07	6.56	6.80	6.60
Others	3.80	3.73	3.50	0.87	0.84	0.80	0.80	3.32	3.14	2.81	2.81
RAPESEED											
World	17.12	18.13	19.80	1.28	1.42		1.37	21.85	25.74	27.09	27.09
United States 1/	0.03	0.03	0.06	1.58	1.74		1.75	0.05	0.05	0.11	0.11
Total Foreign	17.09	18.10	19.74	1.28	1.42	1.39	1.37	21.80	25.68	26.99	26.99
Canada	2.90	2.58	3.20	1.07	1.27	1.31	1.31	3.10	3.28	4.20	4.20
China	4.99	5.50	6.10	1.09	1.26	1.22	1.16	5.44	6.96	7.10	7.10
EC-12	1.81	2.13	2.40	2.96	2.91	2.97	2.94	5.34	6.21	7.07	7.07
East Europe	0.81	0.74	0.68	2.66	2.38	2.48	2.48	2.15	1.75	1.69	1.69
India	4.99	5.60	5.70	0.83	1.02	0.88	0.88	4.12	5.70	5.00	5.00
Others	1.59	1.54	1.66	1.04	1.16	1.12	1.16	1.65	1.78	1.93	1.93
FLAXSEED											
World	3.74	3.79	3.61	0.50	0.62		0.58	1.85	2.34	2.10	2.10
United States	0.07	0.10	0.12	0.47	0.95		0.97	0.03	0.10	0.11	0.11
Total Foreign	3.67	3.69	3.50	0.50	0.61	0.57	0.57	1.82	2.24	1.98	1.98
Argentina	0.58	0.58	0.55	0.90	0.83	0.84	0.84	0.52	0.48	0.46	0.46
Canada	0.60	0.73	0.54	0.83	1.29	1.16	1.16	0.50	0.94	0.63	0.63
India	1.18	1.20	1.20	0.29	0.33	0.33	0.33	0.34	0.40	0.40	0.40
USSR	0.97	0.85	0.85	0.24	0.19	0.21	0.21	0.23	0.16	0.18	0.18
Others	0.36	0.34	0.36	0.67	0.77	0.89	0.89	0.24	0.26	0.32	0.32
MAJOR OILSEEDS	146.88	144.93	149.93	1.40	1.44		1.42	205.83	209.11	215.39	212.40
United States	29.44	29.23	31.21	2.01	2.07		1.96	59.29	60.53	63.24	61.12
Total Foreign	117.44	115.70	118.73	1.25	1.28		1.27	146.54	148.58	152.15	151.28
COPRA	--	--	--	--	--	--	--	4.88	4.98	4.81	4.81
PALM KERNEL	--	--	--	--	--	--	--	3.33	3.36	3.59	3.59
TOTAL OILSEEDS	--	--	--	--	--	--	--	*214.04*	*217.44*	*223.79*	*220.80*
PALM OIL 2/	--	--	--	--	--	--	--	10.91	11.04	11.86	11.91

1/ U.S. rapeseed estimates by the WAOB and Interagency Oilseeds Committee. 2/ Not included in total oilseeds.

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TABLE 7

Cotton Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	July	Aug.	1989/90	1990/91	July	Aug.
	---Million Hectares---			---Kilograms Per Hectare---				---Million 480-Pound Bales---			
World	31.6	33.3	34.8	552	566		570	80.0	86.7	90.3	91.1
United States	3.9	4.7	5.4	688	711		706	12.2	15.5	16.2	17.6
Total Foreign	27.7	28.6	29.3	533	542	548	545	67.8	71.2	74.1	73.5
Maj. Foreign Exporters	13.1	13.3	13.6	727	783	778	775	43.7	47.7	49.1	48.4
Australia	0.2	0.3	0.3	1,326	1,411	1,322	1,322	1.4	1.8	1.7	1.7
Central America 1/	0.1	0.1	0.1	832	802	793	793	0.3	0.3	0.3	0.3
China	5.2	5.6	6.0	728	807	803	798	17.4	20.7	22.5	22.0
Egypt	0.4	0.4	0.4	683	719	755	755	1.3	1.4	1.3	1.3
Mexico	0.2	0.2	0.3	891	913	837	837	0.8	0.8	1.0	1.0
Pakistan	2.6	2.7	2.8	560	607	612	612	6.7	7.5	7.8	7.8
Sudan	0.3	0.2	0.2	456	422	498	498	0.6	0.4	0.4	0.4
Turkey	0.7	0.7	0.6	851	930	887	887	2.8	2.9	2.5	2.5
USSR	3.3	3.2	3.0	805	827	821	817	12.3	12.0	11.5	11.3
Major Importers 2/	0.4	0.4	0.3	886	794	911	911	1.5	1.5	1.4	1.4
Other Foreign	14.2	14.9	15.4	346	321	335	334	22.6	22.0	23.6	23.6
Argentina	0.6	0.6	0.6	486	444	465	465	1.3	1.3	1.3	1.3
Brazil	1.9	2.0	2.0	347	340	381	381	3.0	3.1	3.5	3.5
India	7.3	7.6	7.8	315	264	279	279	10.6	9.2	10.0	10.0
Syria	0.2	0.2	0.2	930	963	934	934	0.7	0.7	0.7	0.7
Others	4.3	4.6	4.9	358	370	370	368	7.0	7.7	8.2	8.2

1/ Nicaragua, Guatemala, El Salvador, Honduras, and Costa Rica.

2/ Western Europe, Eastern Europe, Japan, Hong Kong, Republic of Korea, and Taiwan.

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TABLE 8

The table below presents a 10-year record of the difference between the August projections and the final estimates. Using world wheat production as an example, changes between the August projection and the final estimate have averaged 13.5 million tons (2.7 percent) and ranged from -32.1 to 10.7 million tons. The August projection has been below the final 6 times and above the final 4 times.

RELIABILITY OF PRODUCTION PROJECTIONS

COMMODITY AND REGION	PROJECTION AND FINAL ESTIMATES, 1981/82 - 1990/91 1/					
	Difference		Lowest	Highest	Below	Above
	Average	Average	Difference		Final	Final
	Percent	---Million Metric Tons---			Number of Years 2/	
WHEAT						
World	2.7	13.5	-32.1	10.7	6	4
U.S.	1.4	0.9	-1.8	2.0	5	5
Foreign	3.1	13.5	-31.1	12.0	6	4
COARSE GRAINS 3/						
World	1.5	11.5	-22.5	26.9	7	3
U.S.	4.9	8.8	-16.7	30.6	7	3
Foreign	1.5	8.4	-21.5	13.8	4	6
RICE (Milled)						
World	2.7	8.4	-24.4	3.5	7	3
U.S.	5.1	0.2	-0.4	0.3	7	3
Foreign	2.7	8.4	-24.7	3.8	7	3
SOYBEANS						
World	2.5	2.3	-2.0	5.0	4	6
U.S.	4.9	2.4	-3.8	5.7	4	6
Foreign	5.9	2.5	-3.3	5.4	4	6
		---Million 480-lb. Bales---				
COTTON						
World	3.4	2.7	-11.1	5.5	5	4
U.S.	5.2	0.7	-1.9	1.0	7	2
Foreign	3.3	2.3	-10.7	4.5	5	5
UNITED STATES		-------Million Bushels-------				
CORN	10.1	598	-1,085	2,034	7	3
SORGHUM	12.3	93	-213	171	7	3
BARLEY	5.2	27	-43	52	3	6
OATS	9.9	39	-37	144	3	7

1/ The final estimate for 1981/82-1989/90 is defined as the first November estimate following the marketing year and for 1990/91 last month's estimate.

2/ May not total ten if projection was the same as the final.

3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

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MAP 1

WORLD AGRICULTURAL WEATHER HIGHLIGHTS

AUGUST 12, 1991

NOAA/USDA JOINT AGRICULTURAL WEATHER FACILITY

(More details are available in the Weekly Weather and Crop Bulletin.
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- o **Mexico** — Production is projected at 16.8 million tons, up 0.8 million or 5 percent from last month, but down 8 percent from last year's record. Increased corn production prospects account for the largest change. Beneficial rains in the corn belt have led to increased yield potential.

- o **Iran** — Production is projected at 2.6 million tons, up 0.4 million or 18 percent from last month, but down 1 percent from last year. The increase is due to a higher estimated barley yield.

RICE (MILLED-BASIS): World production for 1991/92 is projected at 344.3 million tons, virtually unchanged from last month but down 1 percent from last year's record crop. Total foreign production in 1991/92 is projected at 339.3 million tons, also virtually unchanged from last month but down 1 percent from 1990/91. Country highlights are as follows:

- o **United States** — Production is forecast at 5.0 million tons, down marginally from last month and down 3 percent from last year.

- o **Bangladesh** — Production is projected at a record 18.4 million tons, up 0.4 million or 2 percent from last month, and up 3 percent from last year's record harvest. Recent heavy rains have probably increased irrigation reserves and raised prospective yields in the fall harvested Amam rice crop.

OILSEEDS: Total world oilseeds production during 1991/92 is forecast at a record 220.8 million tons, down 3.0 million or 1 percent from last month, but up 2 percent from 1990/91. Foreign production during 1991/92 is forecast to be a record 159.7 million tons, down 0.9 million or 1 percent from last month, but up 2 percent from last year. Total oilseed production in the United States is forecast at 61.1 million tons, down 2.1 million or 3 percent from last month, but up 1 percent from last year.

* **Soybeans:** World production for 1991/92 is forecast at 104.2 million tons, down 2.8 million or 3 percent from last month, but up 1 percent from last year. Total foreign soybean output is forecast at 53.4 million tons, down slightly from last month, but up 4 percent from 1990/91. Country highlights are as follows:

  - o **United States** — Production is estimated at 50.9 million tons, down 2.8 million or 5 percent from last month and down 3 percent from last year. The National Agricultural Statistics Service, USDA, reduced yield projections from last month, but held expected harvested area at 23.8 million hectares, up 0.9 million from 1990/91.

* **Cottonseed:** World production for 1991/92 is forecast at 34.9 million tons, down 0.2 million or 1 percent from last month, but up 4 percent from last year. Total foreign production is forecast at 26.7 million tons, down 0.6 million or 2 percent from last month, but up 2 percent from last year. Country highlights are as follows:

  o **United States** — Production is estimated at 6.2 million tons, up 0.4 million or 7 percent from last month and up 14 percent from 1990/91. Official estimates by the National Agricultural Statistics Service this month increased expected average yield and pegged harvested area at 5.4 million hectares, up 0.6 million from last year.

  o **China** — Production is estimated at 8.2 million tons, down 0.3 million or 4 percent from last month, but up 7 percent from last year. Summer floods in the Yangtze River Valley reduced estimated harvested area and yield. China's production is expected to be higher than last year however, as total area is still above last season.

  o **Soviet Union** — Production is estimated at 4.6 million tons, down 0.3 million or 7 percent from last month, and down 7 percent from 1990/91. Excessive moisture conditions have reduced harvested area and yield expectations.

* **Peanuts:** World production for 1991/92 is forecast at 22.7 million tons, up 0.2 million or 1 percent from last month, and up nearly 3 percent from 1990/91. Total foreign production is forecast at 20.4 million tons, unchanged from last month, but down less than 1 percent from last year. Country highlights are as follows:

  o **United States** — Production is estimated at a record 2.3 million tons, up 0.2 million or 8 percent from last month, and up 42 percent from 1990/91. The National Agricultural Statistics Service expects average yield to recover from last year's level and pegs harvested area at 795,000 hectares, up nearly 9 percent from 1990/91.

* **Sunflowerseed:** World production for 1991/92 is forecast at 21.4 million tons, down 0.2 million or 1 percent from last month, and down 3 percent from 1990/91. Total foreign production is forecast at 19.9 million tons, down 0.2 million or 1 percent from last month, and down 5 percent from last year. Country highlights are as follows:

  o **United States** — Production is estimated at 1.5 million tons, up 25,000 tons or nearly 2 percent from last month, and up 49 percent from last year. Slightly higher yield estimates this month are based on favorable growing conditions to date. Harvested area is estimated at 1,025 thousand hectares, up 37 percent from 1990/91.

- o **Soviet Union** Production is estimated at 6.6 million tons, down 0.2 million or 3 percent from last month, but up slightly from last year. Dry conditions have stressed plants in some growing regions, reducing estimated harvested area and average yield.

* **Rapeseed:** World production for 1991/92 is forecast at a record 27.1 million tons, unchanged from last month, but up 5 percent from last year. Total foreign production is forecast at 27.0 million tons, unchanged from last month, but up 5 percent from last year. There were no changes this month.

  - o **United States** Production is estimated at 105,000 tons, unchanged from last month, but nearly double that of last year. Area and production data for 1987/88 through the initial 1991/92 estimate, are estimates from the Interagency Oilseeds Committee and the World Agricultural Outlook Board. The National Agricultural Statistics Service, USDA, is expected to announce its U.S. rapeseed area estimates in January 1992.

* **Flaxseed:** World production for 1991/92 is forecast at 2.1 million tons, unchanged from last month, but down 0.2 million or 10 percent from last year. While production in the United States is small, this year's output is expected to increase by 18 percent over last year, to 114,000 tons. Total foreign production is pegged at 2.0 million tons, down 0.3 million or 11 percent from last year. There were no changes this month.

* **Copra:** World production for 1991/92 is forecast at 4.8 million tons, unchanged from last month, but down 165,000 tons or 3 percent from last year. Copra production reached a record 5.3 million in 1985/86. There were no changes this month.

* **Palm Kernels:** World production for 1991/92 is forecast at a record 3.6 million tons, unchanged from last month, but up 7 percent from last year. There were no changes this month.

* **Palm Oil:** World production for 1991/92 is forecast at a record 11.9 million tons, up slightly from last month and up 8 percent from last year. There were no significant changes this month.

COTTON: World cotton production in 1991/92 is projected at a record 91.1 million bales. This estimate is up 0.8 million bales or 1 percent from last month and up 4.4 million bales or 5 percent from 1990/91 and up from the previous record of 89 million bales harvested in 1984/85. Total foreign production is projected at 73.5 million bales, down 0.7 million bales or 1 percent from last month but is a gain of 3 percent over 1990/91 and second only to the 1984/85 record crop of 76 million bales. Country highlights are as follows:

- **United States** — Production is estimated at 17.6 million bales, up 1.4 million bales or 9 percent from last month, and 14 percent above last year. If realized, this will be the largest crop since 1937/38 when output hit 18.9 million bales. The production increase reflects this year's larger area estimate of 5.4 million hectares, well above the 4.7 million hectares of 1990/91.

- **China** — Production is estimated at 22.0 million bales, down 0.5 million or 2 percent from last month, but up 6 percent from last year. Area and yield were reduced this month due to severe flooding in the Yangtze River valley, but production in 1991/92 is still expected to be higher than last year because of an estimated 400,000 hectare increase in area.

- **USSR** — Production is estimated at 11.3 million bales, down 0.2 million bales or 2 percent from last month, and down 6 percent from last year. Overall, conditions have been normal, except for wet weather in minor producing areas. However, lack of quality seeds and other inputs and antiquated irrigation equipment have been reported.

TABLE 1

U.S. Crop Acreage, Yield, and Production 1/

COMMODITY	PLANTED AREA			HARVESTED AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	1991/92	1989/90	1990/91	July	Aug.	1989/90	1990/91	July	Aug.
	--Million Acres--			--Million Acres--			--Bushels per Acre--				--Million Bushels--			
All Wheat	76.6	77.3	70.0	62.2	69.4	58.1	32.7	39.5	35.0	35.0	2,037	2,739	2,032	2,033
Winter	55.1	57.0	51.0	41.5	50.0	39.5	35.0	40.7	34.4	34.7	1,455	2,033	1,361	1,372
Other	21.5	20.3	19.0	20.7	19.4	18.6	28.1	36.4	36.2	35.6	582	705	671	661
Rye	2.0	1.6	1.7	0.5	0.4	0.4	28.2	23.3	27.6	27.6	14	10	12	12
Soybeans	60.8	57.8	59.8	59.5	56.5	58.7	32.3	34.0		31.8	1,924	1,922	1,970	1,869
Corn	72.2	74.2	75.9	64.7	67.0	68.8	116.3	118.5		107.8	7,525	7,933	8,275	7,418
Sorghum	12.6	10.5	11.0	11.1	9.1	9.7	55.4	62.9		57.9	615	571	630	565
Barley	9.1	8.2	8.9	8.3	7.5	8.4	48.6	55.9	56.5	55.8	404	419	476	470
Oats	12.1	10.4	8.6	6.9	5.9	5.0	54.3	60.1	56.3	52.2	374	357	280	260
							--Pounds per Acre--				--Million CWT--			
Rice	2.7	2.9	2.9	2.7	2.8	2.8	5,749	5,507		5,544	154.5	154.9	157.5	157.0
											--Million 480-Pound--			
All Cotton	10.6	12.3	14.1	9.5	11.7	13.4	614	634		630	12.2	15.5	16.2	17.6

1/ Except for estimated rye production, all estimates are from the USDA National Agricultural Statistics Service (NASS) for 1989/90, 1990/91 and 1991/92. Production and yield estimates for rye are from the USDA Interagency Commodity Estimates Committee.

TABLE 2

World Crop Production Summary

Commodity	World	Total Foreign	North America			Europe			USSR	Asia					South America		Selected Other			All Other Countries
			United States	Canada	Mexico	EC-12	Oth. W. Europe	Eastern Europe		China	India	Indo-nesia	Paki-stan	Thai-land	Argen-tina	Brazil	Aus-tralia	South Africa	Turkey	
	——Million Metric Tons——																			
Wheat																				
1989/90	537.6	482.2	55.4	24.6	4.0	82.0	4.4	40.7	92.3	90.8	54.1	0.0	14.4	0.0	10.2	5.6	14.2	2.0	12.5	15.4
1990/91 prel.	593.0	518.4	74.5	31.7	3.9	84.7	5.1	41.1	108.0	98.0	49.7	0.0	14.3	0.0	11.0	3.2	15.4	1.7	15.0	17.8
1991/92 proj.																				
July	556.1	500.8	55.3	29.0	3.5	88.8	4.1	39.0	92.0	95.0	54.0	0.0	14.5	0.0	10.0	4.0	12.0	2.0	16.0	17.6
August	550.5	495.2	55.3	31.0	3.5	89.0	4.1	39.4	85.5	94.0	54.0	0.0	14.5	0.0	9.0	3.2	12.0	2.0	16.0	17.7
Coarse Grains																				
1989/90	800.0	578.6	221.4	23.5	14.1	89.6	12.4	60.2	104.8	93.5	34.6	5.0	2.7	4.3	8.3	22.5	6.8	9.5	7.5	79.3
1990/91 prel.	827.3	596.7	230.6	26.8	18.4	84.1	13.6	52.3	113.3	106.0	35.0	5.3	2.9	4.0	11.2	24.2	6.9	7.6	8.9	76.4
1991/92 proj.																				
July	828.0	587.1	240.9	24.4	16.0	89.5	12.2	58.0	99.5	99.4	33.0	5.6	2.4	4.1	10.1	26.7	7.4	8.6	9.7	80.5
August	798.6	581.6	217.1	25.9	16.8	89.5	12.2	58.0	91.5	99.4	32.5	5.6	2.4	4.1	10.1	26.7	7.4	8.6	9.7	81.1
Rice (Milled)																				
1989/90	344.0	338.9	5.1	0.0	0.4	1.4	0.0	0.1	1.7	126.1	74.1	29.1	3.2	13.3	0.2	4.9	0.7	0.0	0.2	23.2
1990/91	348.3	343.2	5.1	0.0	0.2	1.6	0.0	0.1	1.6	129.5	75.0	29.4	3.1	11.4	0.2	6.3	0.5	0.0	0.2	23.7
1991/92																				
July	344.2	339.2	5.0	0.0	0.3	1.5	0.0	0.1	1.7	126.0	73.0	29.0	3.2	13.2	0.2	6.8	0.6	0.0	0.2	23.4
August	344.2	339.3	5.0	0.0	0.2	1.5	0.0	0.1	1.7	126.0	73.0	28.9	3.2	13.2	0.2	6.8	0.6	0.0	0.2	23.2
Total Grains 1/																				
1989/90	1,681.7	1,399.8	281.9	48.0	18.5	173.0	16.8	101.0	198.8	310.4	162.7	34.1	20.4	17.6	18.7	33.0	21.7	11.5	20.2	193.4
1990/91 prel.	1,768.6	1,458.4	310.2	58.5	22.5	170.4	18.7	93.5	222.9	333.5	159.6	34.7	20.3	15.4	22.5	33.7	22.9	9.3	24.1	196.1
1991/92 proj.																				
July	1,728.4	1,427.2	301.2	53.4	19.8	179.8	16.3	97.2	193.2	320.4	160.0	34.6	20.1	17.3	20.3	37.5	20.0	10.6	25.9	200.8
August	1,693.4	1,416.0	277.4	56.9	20.5	180.0	16.3	97.6	178.7	319.4	159.5	34.5	20.1	17.3	19.3	36.7	20.0	10.6	25.9	202.7
Oilseeds 2/																				
1989/90	214.0	154.7	59.3	4.9	1.4	11.5	0.7	5.2	13.8	28.5	19.3	2.2	3.3	0.9	15.8	21.8	0.7	1.0	2.3	21.5
1990/91 prel.	217.4	156.9	60.5	5.6	1.0	13.0	0.7	4.3	13.0	33.6	20.4	2.2	3.6	0.7	16.1	17.0	2.0	1.0	1.9	20.5
1991/92 proj.																				
July	223.8	160.5	63.2	6.3	1.1	13.2	0.7	4.2	13.4	34.1	20.2	2.3	3.8	0.7	15.6	19.1	1.0	1.0	1.6	22.3
August	220.8	159.7	61.1	6.3	1.1	13.2	0.7	4.2	12.9	33.7	20.2	2.3	3.8	0.7	15.6	19.1	1.0	1.0	1.6	22.3
	——Million 480-Pound Bales——																			
Cotton																				
1989/90	80.0	67.8	12.2	0.0	0.8	1.5	0.0	0.1	12.3	17.4	10.6	0.0	6.7	0.1	1.3	3.0	1.4	0.3	2.8	9.5
1990/91 prel.	86.7	71.2	15.5	0.0	0.8	1.4	0.0	0.1	12.0	20.7	9.2	0.0	7.5	0.1	1.3	3.1	1.8	0.2	2.9	10.2
1991/92 proj.																				
July	90.3	74.1	16.2	0.0	1.0	1.3	0.0	0.1	11.5	22.5	10.0	0.0	7.8	0.2	1.3	3.5	1.7	0.3	2.5	10.4
August	91.1	73.5	17.6	0.0	1.0	1.3	0.0	0.1	11.3	22.0	10.0	0.0	7.8	0.2	1.3	3.5	1.7	0.3	2.5	10.5

1/ Includes total of wheat, coarse grains, and rice (milled) shown above. Estimates of Soviet total grain production, including wheat, coarse grains, rice (rough), minor grains and pulses are 210.9 million tons in 1989/90, 235.0 million in 1990/91, and 190.0 million forecast in 1991/92.
2/ Totals for major regions and countries include the six major oilseeds shown elsewhere in this report, while world and total foreign also include copra and palm kernels for all countries.
Note: Entries of 0.0 indicate no reported or insignificant production.

TABLE 3

Wheat Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1989/90	Prel. 1990/91	Proj. 1991/92	1989/90	Prel. 1990/91	1991/92 Proj. July	Aug.	1989/90	Prel. 1990/91	1991/92 Proj. July	Aug.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	226.3	231.9	223.6	2.38	2.56	2.48	2.46	537.6	593.0	556.1	550.5
United States	25.2	28.1	23.5	2.20	2.66	2.35	2.35	55.4	74.5	55.3	55.3
Total Foreign	201.1	203.8	200.1	2.40	2.54	2.49	2.47	482.2	518.4	500.8	495.2
Maj. Foreign Exporters	45.1	45.6	44.0	2.91	3.13	3.15	3.21	131.0	142.8	139.8	141.0
Argentina	5.5	5.9	4.9	1.86	1.86	1.89	1.84	10.2	11.0	10.0	9.0
Australia	9.0	9.2	8.0	1.58	1.67	1.50	1.50	14.2	15.4	12.0	12.0
Canada	13.6	14.0	14.1	1.80	2.27	2.06	2.20	24.6	31.7	29.0	31.0
EC-12	17.0	16.5	17.0	4.83	5.14	5.23	5.24	82.0	84.7	88.8	89.0
Major Importers	96.4	98.2	95.6	2.48	2.66	2.53	2.46	238.8	261.2	243.0	235.3
Brazil	3.4	3.3	2.4	1.65	0.97	1.54	1.33	5.6	3.2	4.0	3.2
China	29.8	30.8	30.7	3.04	3.19	3.08	3.06	90.8	98.0	95.0	94.0
Eastern Europe	9.8	9.8	9.8	4.14	4.18	4.00	4.03	40.7	41.1	39.0	39.4
Egypt	0.6	0.7	0.8	5.05	5.79	6.40	6.40	3.2	4.3	4.8	4.8
Other N. Africa 1/	4.7	5.1	5.2	1.13	1.11	1.40	1.44	5.3	5.6	7.3	7.5
Japan	0.3	0.3	0.2	3.47	3.66	3.51	3.51	1.0	1.0	0.9	0.9
USSR	47.7	48.2	46.5	1.94	2.24	1.98	1.84	92.3	108.0	92.0	85.5
Other Foreign	59.7	60.1	60.5	1.88	1.90	1.95	1.96	112.4	114.4	118.0	118.8
India	24.1	23.5	24.3	2.24	2.12	2.22	2.22	54.1	49.7	54.0	54.0
Iran	6.8	6.5	6.2	0.81	1.08	1.03	1.15	5.5	7.0	6.4	7.1
Mexico	1.0	1.0	0.9	4.21	4.11	3.98	3.98	4.0	3.9	3.5	3.5
Non-EC W. Europe	0.8	0.9	0.8	5.19	5.48	5.01	5.01	4.4	5.1	4.1	4.1
Pakistan	7.7	7.8	8.0	1.87	1.82	1.82	1.82	14.4	14.3	14.5	14.5
South Africa	1.8	1.7	1.9	1.11	1.00	1.08	1.08	2.0	1.7	2.0	2.0
Turkey	8.7	8.8	8.9	1.44	1.71	1.80	1.80	12.5	15.0	16.0	16.0
Others	8.7	10.0	9.7	1.76	1.79	1.81	1.83	15.4	17.8	17.6	17.7

1/ Algeria, Libya, Morocco, and Tunisia.

AUGUST 1991 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 4

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	July	Aug.	1989/90	1990/91	July	Aug.
TOTAL COARSE GRAINS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World 1/	321.0	319.2	320.5	2.49	2.59		2.49	800.0	827.3	828.0	798.6
United States	37.0	36.4	37.4	5.98	6.34		5.81	221.4	230.6	240.9	217.1
Total Foreign	284.0	282.9	283.1	2.04	2.11	2.07	2.05	578.6	596.7	587.1	581.6
Maj. Foreign Exporters	21.3	21.0	21.8	2.46	2.69	2.51	2.57	52.5	56.5	54.5	56.0
Argentina	3.2	3.3	3.5	2.64	3.43	2.88	2.88	8.3	11.2	10.1	10.1
Australia	4.0	4.3	4.8	1.73	1.63	1.53	1.53	6.8	6.9	7.4	7.4
Canada	8.3	8.1	7.8	2.84	3.31	3.16	3.31	23.5	26.8	24.4	25.9
South Africa	4.4	3.8	4.2	2.18	1.97	2.07	2.07	9.5	7.6	8.6	8.6
Thailand	1.6	1.5	1.5	2.78	2.58	2.72	2.72	4.3	4.0	4.1	4.1
Major Importers	103.7	99.8	100.6	2.73	2.84	2.74	2.68	282.7	283.1	276.8	269.6
Eastern Europe	16.5	15.9	16.0	3.66	3.30	3.63	3.63	60.2	52.3	58.0	58.0
EC-12	20.2	19.3	19.2	4.43	4.35	4.65	4.66	89.6	84.1	89.5	89.5
Other W. Europe	3.1	3.0	3.0	3.97	4.47	4.10	4.10	12.4	13.6	12.2	12.2
Mexico	7.5	8.2	8.5	1.88	2.23	1.88	1.98	14.1	18.4	16.0	16.8
USSR	56.0	52.9	53.5	1.87	2.14	1.84	1.71	104.8	113.3	99.5	91.5
Other Major Import. 2/	0.4	0.4	0.4	3.83	3.63	3.70	3.70	1.6	1.5	1.5	1.5
Other Foreign	158.9	162.1	160.7	1.53	1.59	1.59	1.59	243.4	257.1	255.8	256.0
Brazil	12.5	13.5	13.5	1.79	1.79	1.98	1.98	22.5	24.2	26.7	26.7
China	28.2	29.1	28.3	3.31	3.64	3.52	3.52	93.5	106.0	99.4	99.4
India	37.7	38.9	37.6	0.92	0.90	0.87	0.86	34.6	35.0	33.0	32.5
Indonesia	2.7	2.9	3.1	1.85	1.83	1.84	1.84	5.0	5.3	5.6	5.6
Nigeria	9.9	9.5	9.9	0.82	0.67	0.84	0.84	8.1	6.3	8.3	8.3
Philippines	3.6	3.8	3.9	1.24	1.24	1.24	1.24	4.5	4.7	4.9	4.9
Turkey	4.4	4.5	4.5	1.70	1.99	2.17	2.17	7.5	8.9	9.7	9.7
Others	59.8	59.9	60.1	1.13	1.11	1.15	1.15	67.8	66.8	68.3	68.9
BARLEY											
World	74.7	73.6	76.3	2.27	2.53		2.28	169.8	186.2	176.0	174.1
United States	3.4	3.0	3.4	2.62	3.00		3.00	8.8	9.1	10.4	10.2
Total Foreign	71.4	70.6	72.9	2.26	2.51	2.29	2.25	161.0	177.1	165.6	163.8
Australia	2.3	2.5	2.9	1.75	1.65	1.50	1.50	4.0	4.2	4.4	4.4
Canada	4.7	4.7	4.7	2.50	3.03	2.83	3.09	11.7	14.1	13.0	14.5
China	3.3	3.3	3.3	1.74	1.73	1.73	1.73	5.7	5.7	5.7	5.7
Eastern Europe	3.6	3.6	3.6	4.03	4.02	3.82	3.82	14.5	14.4	13.8	13.8
EC-12	12.6	12.3	12.0	4.05	4.13	4.16	4.18	51.0	50.7	50.3	50.3
Other W. Europe	1.5	1.5	1.5	3.87	4.35	3.91	3.91	5.9	6.4	5.9	5.9
Turkey	3.4	3.4	3.4	1.46	1.76	2.00	2.00	4.9	6.0	6.8	6.8
USSR	27.6	26.1	28.5	1.75	2.34	1.79	1.65	48.5	61.0	51.0	47.0
Others	12.4	13.3	12.9	1.19	1.10	1.19	1.20	14.8	14.6	14.9	15.5

FOOTNOTES AT END OF TABLE

WEATHER BRIEFS

SOVIET NEW LANDS: RAIN WIDESPREAD, BUT TOO LATE

Precipitation was more widespread during the period of July 12 - August 11, 1991, compared to recent months across the New Lands. In general, the moisture eased dryness and halted crop deterioration caused by stress, but it came too late. Spring grains in the northern Urals benefited from above normal precipitation during this period. Rainfall, although still below normal amounts, increased compared to recent months, across Kazakhstan and the southern Urals. This rainfall, at best, limited further deterioration of spring grains. As of August 12, 1991, the spring grains were nearly mature in these regions, therefore the rain was of little benefit to these crops. During July, 1991, precipitation was well below normal in western West Siberia; large areas received only 25 to 50 percent of normal rainfall. However, during the first week of August rainfall was beneficial, stabilizing crop conditions, since spring grains there were mostly in the grain-filling stage. Temperatures were mostly mild across the New Lands during July 12 - August 11, 1991, which somewhat lessened the effects of the dry weather. The only outbreak of hot temperatures occurred during the week of July 21, 1991, when maximum daily temperatures reached 33 to 38 degrees Celsius in the western New Lands and benefited spring grains by accelerating ripening.

INDIA: RAINFALL REACHES NORTHERN AREAS

The monsoon finally reached northern India and Pakistan crop regions after stalling in early July in an area from Gujarat northeastward to Uttar Pradesh (reported in last month's circular). During the period of July 12 - August 11, 1991, rainfall was more widespread, but amounts for the season are still below normal in the north, particularly, Haryana, Uttar Pradesh, and Bihar. Low rainfall has caused delays in rice transplanting, and corn and oilseed planting. As of August 1, 1991, rice transplanting was only 33 percent complete in Bihar, where 70 percent completion is normal for that date. Precipitation has been very heavy and mostly above normal for this period in Gujarat, Madhya Pradesh, and Orissa. This increased precipitation has improved peanut outlook in Gujarat, although planting is still well behind normal rates. As of August 8, 1991, the Indian Government reported 1.53 million hectares of peanuts were planted; 1.8 million hectares is normal. The eastern rice area received moderate to heavy rainfall. Weekly rainfall has continued to be light-to-moderate in the south, benefiting summer crops which are advancing through reproduction and grain-filling, as of August 12, 1991.

ROMANIA: ABOVE NORMAL RAIN

Rainfall in Romania has been well above normal for the period of July 12 - August 11, 1991. July 1991 precipitation was 173 percent of normal, ending a year of below-normal precipitation. Weekly rainfall amounts have been generally 25-50 mm from mid-July into early August. Heavy rain of over 200 mm fell across northeast Romania during the week of July 28, 1991, causing localized flooding and some crop damage.

PRODUCTION BRIEFS

PHILIPPINES: VOLCANO ERUPTIONS CAUSE LITTLE DAMAGE TO RICE CROP

Initial reports from the U.S. agricultural counselor in Manila indicate that Philippine rice production will not be significantly affected by Mt. Pinatubo's volcanic eruptions. According to the Philippine National Food Authority's preliminary estimate, 32,000 metric tons of milled rice were lost due to the eruptions, and another 585 metric tons of rice stocks were lost when a warehouse collapsed due to heavy accumulation of volcanic debris. Volcanic debris is making field work difficult for the July-September wet-season crop. About 10,000 hectares, out of a total of 174,000 in the surrounding area, are estimated to be unplantable. Last year the region's wet-season crop totaled about 390,000 tons (milled basis) from a total Philippine crop of 6.2 million tons.

CANADA: INITIAL PAYMENTS ANNOUNCED FOR GRAINS

The Canadian Government recently announced the initial payments for wheat and barley by the Canadian Wheat Board (CWB) for marketing year 1991/92. Payments for base grades of wheat and barley and designated malting barley all declined substantially again this year. Initial payments for number 1 red spring wheat dropped 33 percent to Can$95 from Can$135, durum dropped 28 percent to Can$90, barley dropped 22 percent to Can$70, and malting barley dropped 28 percent to Can$90. Grade and quality price differentials will be announced later. The initial wheat payments are the lowest since 1975/76. The low prices are a reflection of anticipated low world prices for the remainder of the year and allow the CWB a greater opportunity to price wheat and barley exports aggressively.

COSTA RICA: RICE PRICE INCREASED

The consumer price for rice was increased 36 percent, according to the U.S. agricultural attache in San Jose. Prices are revised periodically according to a production cost model to ensure adequate domestic production. The price increase affects the new crop which is beginning to be harvested from the south and central Pacific areas; harvest will continue until December. The rice office believes that low stock levels necessitate imports, especially before the major harvest arrives in October. It reports planted area has decreased by 11 percent from 1990/91. Rice millers consider the price increase insufficient whereas labor unions believe it is excessive. The National Production Council (CNP) is against imports because of the financial burden, and because it believes that stock levels are high enough to get by until the new crop is harvested. The CNP is in charge of imports.

SOVIET UNION: GRAIN PROCUREMENT POLICY SET

The Soviet Central Government has issued a decree outlining new grain procurement policies. The decree is designed to ensure grain and oilseed deliveries to both the State and the various Republic Governments, and sets a procurement target of 77 million tons of grain. About 15 percent of the total procurement will be delivered to the central government pool, which will provide grain to the military services, health care facilities, and other centralized agencies. The remainder will go to republic grain pools, which will service the general cereal-product needs of the respective republics. Particular attention will be paid to increasing procurements of grain for compound feed in order to reduce feeding of un-supplemented grain. State orders for grain deliveries to the State will be mandatory. Once the producer meets the State order, however, the rest of the harvest can be marketed in several ways: traded to the State for equipment and consumer goods; sold to the State for hard currency; or disposed of through other approved channels, including the open market.

AUSTRALIA: CATTLE HERDS EXPAND, SHEEP NUMBERS FALL SHARPLY

The U.S. agricultural counselor in Canberra reports that Australian cattle numbers will expand more slowly than expected this year and again next year. Sheep numbers are expected to fall 10 percent in 1991 and 6 percent in 1992. Cattle herd growth is expected to be slow, despite the falling sheep numbers and limited prospects for grain profits, because sheep and grain farmers do not have the funds to shift to cattle. Dry weather in Southern Australia in the first half of this year also limited herd expansion prospects.

CHINA: RED MEAT PRODUCTION INCREASING

China's 1991 red meat production is estimated at a record 25.1 million tons, a gain of 3 percent. Pork is by far the predominant meat with 1991 production estimated at 23.3 million tons up only 2 percent from 1990 after a 7 percent expansion the year before. The slow-down is expected due to the recent disastrous flood which damaged the feed supply system, destroyed feedstuffs and buildings, and drowned some hogs. In 1992, pork output is forecast to grow by over 5 percent to 24.6 million tons. Beef production is projected up 14 percent to 1.43 million tons this year and up 13 percent to 1.61 million tons in 1992. Sheep and goat meat output is projected to expand 8 percent to 1.15 million tons in 1991 and gain 4 percent to 1.2 million tons in 1992. These changes in beef and sheep/goat meat production are believed to be largely due to better management by livestock producing households. Many have been allowed to lease 50 to 100 hectares of grazing rights, which has encouraged them to invest in pasture improvement.

CHINA: FLOODING HURTS SUMMER GRAIN, AUTUMN CROPS

The severe floods that swept over central China this summer began to recede by the end of July, and officials are starting to tally the damage. A spokesman for the State Statistical Bureau (SSB) reported that flooding in the Yangtze River valley covered 16 million hectares, with crops on 2.6 million hectares of crops completely destroyed. The crops most affected were winter wheat, winter barley, rice, and cotton. In addition, the SSB said about 4 million tons of grain in storage were destroyed by the floods. Despite these losses, the SSB put China's 1991 summer-harvested grain output at 98.2 million tons, down only

1.9 percent from last year's harvest. (Normally about 86 percent of the summer-harvested grain crop is winter wheat). Record and near-record harvests in Shandong and other northern Chinese provinces are apparently offsetting some of the summer grain losses reported in Anhui, Jiangsu, and Henan. Significant amounts of early rice and cotton also were destroyed in the flooding. Planting of autumn-harvested crops (late rice, corn, soybeans, etc.) was delayed by more than two weeks in the worst-affected areas. Chinese officials fear that these crops face a greater-than-normal probability of being hurt by cold temperatures and early frosts this fall. As a result, they expect total agricultural production for 1991 to be lower than last year.

CHINA: NORTHEAST FLOODS, SOUTHERN DROUGHT AFFECT CROPS

Although the floods in central China have been getting all the attention this summer, other parts of China also are experiencing difficult weather. In the Northeast provinces of Heilongjiang, Jilin, and Liaoning, flash floods and rising rivers have affected more than 3.0 million hectares of cropland, predominately mature spring wheat, soybeans, and corn. Meanwhile, a drought in southern China has intensified over the past 2 months, threatening the single season and late rice crops. Reservoirs are drying up and drinking water is being rationed in many areas. In mid-July, two typhoons hit the coast of southern China with extremely strong winds and heavy rain, causing serious localized crop damage. The rain eased the drought in Guangdong and southern Guangxi, but brought no relief to the drought-affected areas in the interior.

NEW ZEALAND: DAIRY PRODUCTION UP IN 1991

Preliminary data show New Zealand's 1991 (June 1990/May 1991) milk production was up 3 percent to 342,000 tons (butterfat basis), according to the U.S. agricultural attache in Wellington. Except for one short dry spell, pasture growing weather was good throughout the entire year. The production outlook for 1992 is for a small decline, with butterfat output forecast to be in the 325,000 to 330,000-ton range. The Dairy Board set the final 1990/91 producer payment at NZ$3.70 per kilogram of butterfat, down sharply from last year's NZ$5.80. Since many processors pay more than the minimum, actual payment to farmers is expected to average near NZ$4.20 per kilogram compared to NZ$6.30 last year. The Dairy Board has announced an initial payment level of NZ$3.70 for the 1991/92 season.

FINLAND: FORESTRY SITUATION

The Finnish forest industry is facing a severe downturn during 1991. The timber harvest is expected to decline by 21 percent to 43.5 million cubic meters (CUM) due to spiraling production costs, excessively high stocks, and a slowdown in the domestic economy. In an effort to liquidate surplus stocks, the various wood product sectors jointly demanded that forest owners lower the 1991 raw material selling prices. The private forest owners refused and countered with a sales boycott, effective April 1, 1991. The boycott reportedly will remain in effect until a satisfactory price agreement can be reached, which, to date, has not occurred.

The projected cutback in 1991 fellings is expected to adversely impact the entire industry. Softwood log production is forecast to decline to a 5-year low of 15.7 million CUM. The 1991 cut of temperate hardwood logs is expected to total only about 1.2 million CUM, down 24 percent from the 1990 volume of nearly 1.6 million CUM. Projected mill production of softwood lumber is not expected to exceed 6.0 million CUM, off 19 percent from a year ago, mainly due to high domestic raw material prices and strong competition in export markets. However, the hardest hit reportedly will be the particleboard industry. The permanent closing of three particleboard mills during 1990 reduced production capacity in this sector by one-third. Current assessments indicate output of particleboard will plummet to 450,000 CUM, potentially the lowest level recorded since 1970.

Production estimates are as follows in 1,000 cubic meters:

	1989	1990	1991 1/
HARVEST	58,730	55,130	43,530
Softwood logs	20,680	19,600	15,740
Temperate hardwood logs	1,640	1,560	1,180
Poles, piles, posts, pitprops	122	120	100
Softwood lumber	7,850	7,400	6,000
Temperate hardwood lumber	68	68	65
Railroad ties/sleepers	35	20	20
Softwood veneer	20	20	20
Temperate hardwood veneer	10	10	10
Softwood plywood	103	90	75
Temperate hardwood plywood	511	510	410
Particleboard	671	526	450

1/ Preliminary.

SWEDEN: FORESTRY SITUATION

The current outlook for the Swedish forest industry indicates that production of wood and most wood products will be below the record 1990 level due to increased competition and uncertainty on world markets. Sweden's 1991 timber cut is forecast at 65.7 million cubic meters (CUM), down 3 percent from a year ago. Softwood log production is expected to drop 4 percent to 22.3 million CUM. Fellings of temperate hardwood logs are forecast at a 10-year low of 700,000 CUM.

Production of softwood lumber and temperate hardwood lumber is expected to plummet 9 percent during 1991, to 10.5 million CUM and 350,000 CUM, respectively. The downturn was precipitated by Germany's heavy fellings of storm-damaged trees during 1990. This action glutted European markets with a surplus of sawnwood at substantially reduced prices. By the end of 1990, Swedish sawmills were confronted with sharply reduced orders from traditional European export markets which were already overstocked and reluctant to maintain trading levels after the onset of the Gulf War. Swedish sawmills were forced to institute immediate production cuts. The situation was further aggravated by projections of a 26-percent reduction in domestic building activity during 1991.

After several structural changes during the 1980's, the Swedish panel products industry, especially the particleboard sector, reduced production capacity to more closely match the needs of the domestic market. Current assessments indicate softwood plywood production will increase for the second consecutive year to 68,000 CUM, marginally above the 1990 volume, but 8 percent below the 1987 record of 74,000 CUM. Production of temperate hardwood plywood is expected to remain stable at 2,000 CUM. Particleboard production is expected to recover to 860,000 CUM based on the success of a new line of high quality products for use in the furniture and joinery industries.

Production estimates are as follows in 1,000 cubic meters:

	1989	1990	1991 1/
HARVEST	67,100	67,500	65,700
Softwood logs	22,500	23,200	22,300
Temperate hardwood logs	750	772	700
Poles, piles, posts, pitprops	42	49	50
Softwood lumber	11,251	11,594	10,500
Temperate hardwood lumber	375	386	350
Railroad ties/sleepers	20	20	20
Softwood plywood	66	67	68
Temperate hardwood plywood	2	2	2
Particleboard	864	843	860

1/ Preliminary.

FEATURE COMMODITY ARTICLES

WORLD OILSEEDS OUTLOOK

Total world oilseeds production for 1991/92 is forecast at a record 220.8 million metric tons, 3.4 million or 2 percent more than last year. Soybeans, cottonseed, rapeseed, and peanuts combined are forecast up 4.1 million tons, but the increase will be partially offset by reduced output of 0.6 million of sunflowerseed and 0.2 million of flaxseed. Foreign output is expected to account for 83 percent of the increase, breaking last year's previous record foreign crop by 2.8 million tons, to 159.7 million. In addition, the United States is expected to have its highest output of oilseeds in over 5 years.

UNITED STATES

Oilseeds production by the United States is pegged at 61.1 million tons, up 0.6 million or 1 percent from 1990/91. Although soybean production is projected to reach only 50.9 million tons, 1.4 million below last year, other oilseeds are expected to increase output this year. Peanuts (up 0.5 million), sunflowerseed (up 0.5 million), and cottonseed (up 0.8 million) are up a combined total of over 1.9 million tons.

FOREIGN OILSEEDS

The expected record 1991 crop of 159.7 million tons of total foreign oilseeds includes increases in soybeans (up 2.3 million tons), rapeseed (up 1.3 million), and cottonseed (up 0.6 million tons) for a total of 4.1 million. These are expected to be offset, however, by estimated declines in sunflowerseed (down 1.1 million), flaxseed (down 0.3 million), and peanut (down 0.1 million) output, holding total foreign oilseed increases to 2.8 million tons or 2 percent over last year. Record total oilseeds output is estimated for Canada, the European Community, China, Indonesia, Pakistan, and Paraguay.

Canada: Canadian oilseeds production is estimated to reach 6.3 million tons in 1991/92, breaking the previous record of 5.9 million set in 1987/88. Boosted by a significant area increase and good growing conditions, rapeseed is estimated at 4.2 million tons, up 0.9 million or 28 percent over last year. Soybeans also are estimated to be up over 1990/91, reaching nearly 1.4 million tons, 4 percent larger than last year. Counterbalancing this rise is an expected drop in the output of flaxseed, sunflowerseed, and peanuts. Flaxseed will lead the decline in production with by 0.3 million tons or 33 percent, due primarily to reduced area.

The European Community (EC): The EC is estimated to slightly surpass last year's total oilseeds production by 0.2 million tons, to a record 13.2 million. While harvested area estimates are down for sunflowers, soybeans, and cotton, an estimated 13 percent increase in rapeseed area will lead to an estimated record rapeseed crop of over 7.0 million tons, 0.9 million over 1990/91. The upward trend of EC oilseed production is a continuing result of support price programs and has not been significantly affected by the initiation of the Guaranteed Minimum Quantity (MGQ) scheme. A new oilseeds price support regime was submitted to the EC ministers for approval in late July, with the expectation that the program will begin in 1992.

Eastern Europe: Total oilseeds production in Eastern Europe for 1991/92 is estimated at 4.2 million tons, 1.5 million tons below the record set in 1986/87 of 5.7 million. All major oilseeds are estimated to fall in both area and output. Sunflowerseed and rapeseed account for 90 percent of all oilseeds produced in Eastern Europe. Poland's 1991/92 rapeseed crop is pegged at 1.2 million tons, down 56,000 tons or 5 percent from last year. Winter rapeseeds suffered only minor losses to adverse cold and reduced snow cover this past season. Yugoslovia's rapeseed and sunflowerseed crops decline by 47 percent and 42 percent, respectively, while Czechoslovakia is forecast to harvest a better-than-average rapeseed and sunflowerseed crop. Hungary and Romania are the largest sunflower producers in Eastern Europe. Harvested area is expected to increase slightly in Hungary and improved yields over last year will likely push output up 4 percent, to 0.7 million tons. Romania, however, is expected to harvest 9 percent less sunflower area than 1990/91. Sunflowerseed production is expected to decline only 550,000 tons or 1 percent, however, due to improved average yield.

USSR: The Soviet Union is expected to harvest its third largest total oilseeds crop this year, estimated at 13.2 million tons. All oilseeds are expected to increase over last year's level. At 6.6 million tons, the 1991/92 sunflowerseed crop will be only marginally above last season, reflecting a slight increase in area. Dry conditions in some sunflower growing regions have stressed plants, but no significant loses are anticipated. Cotton area is expect to decline 10 percent from last year. As a result, cottonseed output is estimated to decline by 7 percent to 4.6 million tons.

Total Asia: Oilseeds production in Asia, including central and southern Asia, is estimated at a record 70.3 million tons, up slightly from 1990/91. China, Indonesia, and Pakistan will likely have record total oilseed crops. While harvested area for all the major oilseeds is expected to increase over last year for the combined region, mixed yield prospects will hold production near last year's level. Reduced production of rapeseed, peanuts, copra, and sunflowerseed will be offset by larger cottonseed, soybeans, and palm kernel harvests.

China: Total oilseeds production in China for 1991/92 is estimated at a record 33.7 million tons. While area is up for all oilseed field crops, average yields are expected to fall short of last season. Peanut production is estimated to be down 9 percent from 1990/91, falling 0.6 million tons to 5.8 million. Output of sunflowerseed, the smallest oilseed crop grown in China, will likely decline from 1.2 million tons to 1.15 million. On the up side, cottonseed production is estimated up 7 percent over last year, to a near record 8.2 million tons. Bolstering production further are slight increases in soybeans and rapeseed production.

India: India is expected to harvest a near record total oilseeds crop of 20.6 million tons, from a record 26.7 million hectares, for 1991/92. An estimated record peanut crop of 7.6 million tons, combined with a 5 percent increase in cottonseed, will not be enough to offset an expected 12 percent decline in rapeseed production. Following last year's excellent yield; the rapeseed harvest is expected to reflect a return to more normal yields. This monsoon season progressed slowly through the northern regions of India, but eventually spread beneficial moisture in time for late planting. The delay in rainfall did, however, increase the risk of reduced output if timely rains fail to replenish soil moisture during September-October.

Pakistan: This year's estimated record 3.8 million tons of oilseeds, 4 percent over 1990/91, can be attributed to an expected 129,000-ton increase in Pakistan's most important oilseed crop, cottonseed. Pakistan produces small amounts of flaxseed, sunflowerseed, peanuts, and soybeans. It also harvests about twice as much rapeseed as the United States, nearly 250,000 tons. Cottonseed accounts for 90 percent of total oilseeds output. A record 2.8 million hectares of cotton is expected to be harvested with a record cottonseed yield slightly higher than last year's 1.21 tons per hectare. Pakistan's cotton crop is not usually dependent upon the monsoon season for moisture as nearly all cotton is irrigated. Reservoirs levels and water supplies are abundant this season as a result of the excellent monsoon conditions of the past two years.

Indonesia: A record 4.3 million tons of oilseeds is estimated for 1991/92, up nearly 0.2 million or 4 percent from 1990/91. A steady upward trend in oilseeds output continues for the islands, with copra and soybeans leading other oilseeds such as peanuts, palm kernel, and a small amount of cottonseed. Soybeans will just surpass copra in output this year with a 4 percent increase over 1990/91 to 1.4 million tons. Peanut and palm kernel output, estimated at 0.9 million tons and 0.6 million, respectively, reflects increases during 1991/92 of 3 and 2 percent, respectively.

South America: South America is forecast to produce 38.3 million tons of oilseeds in 1991/92, up over 5 percent from 1990/91. While sunflowerseed, peanuts, and flaxseed are estimated to decline in Argentina, Brazilian normal soybean yields would cause a net increase in South American total oilseeds production of just under 2.0 million tons.

Brazil: While total Brazilian output, at an estimated 19.1 million tons, is forecast up 12 percent from last year, all the increase is due to an anticipated return to more normal yields and average field abandonment following last season's extremely dry weather. Soybeans, which account for 92 percent of total oilseeds production, are estimated at 17.5 million tons harvested from 10.0 million hectares in 1991/92. The Government's policy of supporting domestic food crops such as corn over soybeans likely will continue for the near future, but a statement recently released by officials outlined their intentions to provide agricultural support to producers much earlier than released last year. Last year, many producers of corn and soybeans alike had little or no available operating funds due to a dearth of credit from either banks or government sources. Many producers remain in arrears for credit used during 1989. The effectiveness of this year's Government policy will have to be compared to the relative corn/soybean price ratio in light of international soybean prices during the

October-December planting period. Weather in the United States has reduced this year's U.S. soybean estimate, and international soybean prices could climb. In response to higher prices, Brazilian soybean producers may increase their planted area above present estimates. This is particularly true in Brazil's center-west region, where producers have few field crop alternatives to soybeans.

Argentina: Total oilseeds production in 1991/92 is forecast to fall by 0.6 million tons from last year's record, to 15.6 million. This would however, be the third largest crop on record. All the major oilseeds are expected to show declines in the upcoming season. Sunflowerseed area is expected to lead the decline with an estimated 0.4 million drop in output from last year, accompanied by a 75,000 ton decline in peanuts, 50,000 in soybeans, 40,000 in cottonseed, and 20,000 in flaxseed. Harvested area is forecast to climb for soybeans (5 percent) and sunflowers (9 percent).

Paraguay: Given normal yields total oilseeds production could reach a record 2.1 million tons. Total oilseeds output has hovered near this level since 1988/89, but below average yields and abandoned area, due to adverse weather, have prevented a record harvest. Harvested soybean area is forecast to climb marginally and, with an average yield, output is expected to reach 1.6 million tons, up 23 percent over last year's disappointing harvest. The cotton harvest also is forecast to improve slightly, providing an additional 75,000 tons of cottonseed, Paraguay's best ever production.

Africa: Total oilseeds production in Africa is forecast at 8.7 million tons in 1991/92, the second largest on record. Oilseed output in Africa is dominated by peanuts (3.9 million tons), cottonseed (2.4 million), and sunflowerseed (1.0 million). An estimated 484,000 tons of soybeans are also forecast for 1991/92, 19 percent over last year. The largest soybean producers are South Africa, Egypt, and Zimbabwe, each accounting for over 100,000 tons, followed by Nigeria and Zambia. Tropical oilseeds account for the remaining oilseeds, particularly palm kernel in Nigeria (270,000 tons or 43 percent of all Africa) and copra from Mozambique, the Cote d'Ivoire and Tanzania.

Nearly all of this year's 3 percent total oilseeds increase over 1990/91 is expected to come from an excellent peanut crop, estimated at slightly under 3.9 million tons, up 5 percent from last year. Peanuts are grown throughout the continent and, with few exceptions, the 1991/92 crop could repeat or exceed last year's harvest. Of special note are the forecast increases in the major peanut producing countries of the Sudan (up 75,000 tons to 0.4 million), Gambia (up 45,000 tons to 120,000), Nigeria (up 30,000 tons to 0.4 million), and Senegal (up 25,000 tons to nearly 0.7 million). Malawi is also forecast to harvest an additional 22,000 tons from last year, to 56,000 tons.

Africa's cottonseed production for 1991/92, while expected to be harvested from 5 percent more area than last year, is projected to increase only slightly. Egypt is the largest cottonseed producer in Africa, with an estimated output of 515,000 tons in 1991/92 (down from 575,000 last year). The next largest cottonseed producers are Mali, with 225,000 tons (up from 200,000 last year), and the Sudan with 190,000 tons (no change from last year). Producers in the range of 130,000 tons or more include the Cote d'Ivoire (157,000 tons), Tanzania (150,000 tons), and South Africa (130,000 tons).

Sunflowerseed production in Africa is estimated at 1.0 million million, a marginal decline from 1990/91. Approximately 57 percent of all Africa's sunflowerseeds are produced by South Africa, followed by Morocco with 19 percent. While Morocco is estimated to increase both its harvested area and seed output by 30,000 tons over last year, South Africa is expected to harvest 9 percent fewer hectares for a sunflowerseed collection 75,000 tons below 1990/91, to 575,000 tons.

The Middle East: Middle East total oilseeds production is forecast to be 2.3 million tons in 1991/92, down 15 percent from 1990/91 and the lowest level since 1982/83. With the exception of peanuts, a relatively minor oilseed in this region, production is expected to be down for oilseeds. Cottonseed is the major oilseed in the Middle East, accounting for over 55 percent of production. Sunflowerseeds, soybeans, and peanuts account for the majority of the remaining oilseeds with 31 percent, 8 percent, and 5 percent of total output, respectively.

Cottonseed production is forecast at 1.3 million tons in 1991/92, down 0.2 million or 14 percent from last year. While nearly every Middle East country is estimated to have reduced cotton area slightly in 1991/92, Turkey is expected to lower harvested area by 47,000 hectares or 7 percent. Turkey normally produces over 60 percent of the region's cottonseed and one-half of all oilseeds. In 1991/92, Turkey is expected to produce 0.8 million tons of cottonseed, down 130,000 tons. Other important cottonseed producers include Syria with 20 percent of total regional production and Iran with 13 percent.

Sunflowerseeds are produced mainly by Turkey. An estimated 650,000 tons of the 1991/92 Middle East sunflowerseed harvest of 702,000 tons will come from Turkey. During 1991/92, Turkey is expected to reduce harvested area by 150,000 hectares to 550,000, a 21 percent drop from last year. Lower area, combined with poor yields, will push the estimated production in Turkey down 23 percent, from 850,000 tons to 650,000.

Turkey also produces 60 percent the all peanuts grown in the Middle East. In 1991/92, peanut production is expected to reach 70,000 tons in Turkey, up from 50,000 in 1990/91 and reversing two years of declining output. Along with a 5,000 ton increase in peanut production in Syria, to 25,000 tons, total Middle East peanut production is expected to reach 115,000 tons in 1991/92.

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TABLE 9

Total Oilseeds Harvested Area and Production 1/

Year	World Total	Total Foreign	North America: United States	North America: Canada	North America: Mexico	Europe: EC-12	Europe: Other Europe	Europe: Eastern Europe	USSR	Asia: China	Asia: India	Asia: Indo-nesia	Asia: Paki-stan	Asia: Thai-land	Asia: Other Asia	South America: Argen-tina	South America: Brazil	South America: Para-guay	South America: Other S.A.	All Africa	Middle East
Area Harvested (million hectares)																					
79/80	131.40	94.58	36.82	4.78	0.83	1.69	0.21	2.30	9.49	16.96	20.84	1.25	2.49	0.31	2.06	5.74	11.09	0.64	0.92	10.45	1.76
80/81	127.77	92.66	35.12	3.05	0.59	1.99	0.25	2.48	9.64	18.20	20.92	1.33	2.59	0.35	2.16	4.25	10.77	0.72	0.75	10.09	1.84
81/82	131.11	96.35	34.76	2.27	0.81	2.29	0.25	2.46	9.38	20.52	22.61	1.09	2.69	0.39	2.36	4.97	10.57	0.73	0.60	9.88	1.82
82/83	131.84	97.08	34.77	2.85	0.62	2.61	0.26	2.33	9.54	21.60	21.55	1.16	2.75	0.33	2.29	5.53	10.47	0.63	0.39	9.76	1.81
83/84	129.93	99.62	30.31	3.18	0.66	3.02	0.25	2.30	9.62	20.25	22.15	1.41	2.64	0.38	2.53	6.29	11.55	0.76	0.51	9.57	1.84
84/85	137.81	104.53	33.29	4.29	0.73	3.34	0.25	2.52	9.30	21.06	22.01	1.43	2.68	0.39	2.73	6.94	12.77	0.99	0.68	9.45	2.04
85/86	136.62	105.57	31.05	4.00	0.65	3.91	0.26	2.69	9.33	22.14	22.14	1.52	2.82	0.45	2.72	7.54	11.79	0.93	0.83	8.98	2.02
86/87	132.70	103.99	28.71	3.81	0.55	4.20	0.28	2.81	9.27	21.88	21.32	1.45	2.94	0.46	2.64	6.62	11.58	0.84	0.77	9.93	1.97
87/88	140.31	111.57	28.74	3.76	0.73	5.24	0.30	2.86	9.94	22.43	22.28	1.67	2.96	0.49	2.80	7.68	13.18	1.07	0.91	10.41	2.11
88/89	145.82	116.22	29.60	4.75	0.50	5.16	0.32	2.78	10.12	22.33	24.74	1.81	2.95	0.58	2.69	7.39	14.38	1.34	1.13	10.46	2.16
89/90	146.88	117.44	29.44	4.10	0.76	5.01	0.34	2.95	10.10	21.93	25.76	1.84	3.02	0.68	2.63	9.08	13.81	1.53	1.06	9.97	2.31
90/91	144.93	115.70	29.23	3.87	0.56	5.86	0.33	2.48	9.94	22.35	26.00	1.88	3.13	0.57	2.66	8.46	11.85	1.48	1.03	10.38	2.11
91/92f	149.93	118.73	31.21	4.40	0.64	5.67	0.33	2.28	9.91	23.78	26.65	1.93	3.23	0.59	2.66	8.83	12.20	1.50	1.05	10.63	1.85
Production (million metric tons)																					
79/80	169.57	97.39	72.18	5.10	1.46	2.50	0.36	3.51	10.56	16.78	11.01	2.72	1.74	0.38	4.64	6.67	16.78	0.74	1.06	8.00	2.17
80/81	154.92	99.00	55.92	3.78	1.11	3.56	0.43	3.71	10.44	19.44	11.02	2.92	1.75	0.40	5.02	5.79	16.67	0.82	0.85	7.84	2.27
81/82	169.15	105.18	63.96	3.09	1.43	3.60	0.41	3.74	10.64	23.59	14.04	2.61	1.83	0.42	5.41	7.30	14.35	0.81	0.74	7.79	2.17
82/83	177.98	109.83	68.15	3.92	1.04	4.80	0.48	3.76	11.17	26.01	11.97	2.60	2.01	0.38	5.39	7.84	16.21	0.70	0.52	7.75	2.26
83/84	165.00	114.57	50.43	3.84	1.16	4.86	0.48	3.71	9.93	27.22	14.00	3.00	1.32	0.45	4.89	10.52	16.77	0.77	0.64	7.26	2.48
84/85	191.05	131.86	59.19	5.12	1.19	6.59	0.49	4.46	10.06	31.06	15.10	3.15	2.34	0.58	6.10	11.34	20.39	1.26	0.88	7.52	2.59
85/86	196.16	130.73	65.43	5.49	1.26	7.63	0.48	4.31	11.10	31.56	13.51	3.28	2.78	0.63	7.08	12.52	15.74	0.84	1.21	7.33	2.49
86/87	194.90	135.40	59.50	5.81	1.10	8.75	0.55	5.67	11.66	30.94	13.66	3.22	2.97	0.66	6.47	10.83	18.60	1.15	1.05	8.32	2.68
87/88	210.57	149.56	61.01	5.90	1.38	12.77	0.50	4.95	12.57	33.70	14.74	3.56	3.24	0.65	6.35	13.95	19.76	1.45	1.28	8.71	2.65
88/89	204.15	153.81	50.34	5.89	1.19	11.89	0.59	4.66	13.37	30.62	19.70	3.84	3.22	0.90	6.30	10.72	24.58	2.01	1.52	8.38	3.09
89/90	214.04	154.75	59.29	4.88	1.60	11.45	0.73	5.21	13.78	28.53	19.61	4.11	3.26	1.00	6.97	15.84	21.79	2.00	1.36	8.25	3.07
90/91	217.44	156.91	60.53	5.62	1.19	13.04	0.69	4.31	13.03	33.59	20.75	4.19	3.65	0.81	7.07	16.15	16.98	1.71	1.49	8.38	2.71
91/92f	220.80	159.68	61.12	6.28	1.28	13.24	0.72	4.20	13.18	33.71	20.56	4.34	3.78	0.85	7.04	15.56	19.08	2.09	1.58	8.66	2.30

1/ Soybeans, cottonseed, peanuts (in-shell basis), sunflowerseed, rapeseed, flaxseed, palm kernel, and copra.

[box] = Indicates largest figure for years shown.

AUGUST 1991

Production Estimates & Crop Assessment Division, FAS, USDA

EC-12 OILSEED PRODUCTION OUTLOOK

Total European Community (EC) oilseed production for 1991/92 is estimated at a record 13.2 million tons. Total oilseed area declined nearly 4 percent from 1990 as farmers shifted to grain crops following last year's drought in northern Europe. With the exception of the Iberian Peninsula, this spring's favorable weather boosted estimated total yields slightly above last year. Total area and yield are estimated to be the second highest on record. Even though the EC has a price support regime intended to stabilize oilseed production, total output continues to grow along a trend line established in the early 1980's.

Rapeseed: EC-12 rapeseed production is estimated at a record 7.1 million tons, up 0.9 million or 14 percent from last year. Rapeseed production accounts for 46 percent of the total EC oilseed crop and has increased at an annual rate of 30 percent over the past 10 years. Harvested area is estimated at a record 2.4 million hectares, up 0.3 million or 12 percent from last year. Harvested area has doubled since the early 1980's. With unification, Germany now leads France in rapeseed production with 39 percent of the total EC output versus 28 percent from France. The United Kingdom and Denmark contribute 19 and 12 percent, respectively.

EC harvested area this season is forecast to increase for several complementary reasons. In addition to the relative profitability of rapeseed in rotation with wheat this year, favorable planting weather boosted sown area. Also, winter rapeseed plantings were reported to have increased at the expense of spring rapeseed, not only because of higher profits but also due to environmental legislation to reduce nitrate wash-out during the winter. In Denmark, environmental legislation requires that 65 percent of arable land be covered during the winter period.

Germany, Denmark, and the United Kingdom are expected to produce record crops, while France is seen producing its second largest harvest. After a mild winter, late frosts hit Europe in early May, causing only limited damage and are not expected to affect the harvest. However, in central-eastern France, abnormally dry and cold weather in recent months has been the principal yield limiting factor this growing season.

Sunflowerseed: EC sunflowerseed production during 1991 is estimated at 3.8 million tons, down 0.3 million or 8 percent from last year's record. Sunflowerseed production accounts for 28 percent of the total EC oilseed crop and has increased significantly over the past 10 years. Harvested area is estimated at 2.3 million hectares, down 0.3 million or 12 percent from last year's record. Harvested area has more than doubled since 1980. France and Spain account for about 87 percent of the EC sunflowerseed production.

Although France and Spain harvest approximately the same area, France produces twice the amount of Spain. Spain's arid climate reduces yield to half that of France. This year, Spain's area was reduced from 1990, reflecting the disappointment of farmers with prices received a year ago and uncertainties with respect to the final outcome of the 1991/92 EC price package. In Spain, production is estimated to be lower as the spring weather was dry in the major producing areas such as Andalusia. In France, farmers are seen returning to

corn, after last year's drought prevented normal corn plantings. France is expected to return to near average sunflowerseed production based on normal yields. The 1990 drought cut sunflower yields by 11 percent. This year's sunflowerseed harvest could surpass present estimates if favorable weather continues.

Soybeans: EC soybean production is estimated at 1.8 million tons, down 0.4 million or 16 percent from last year's second largest harvest. Soybean production accounts for 14 percent of the total EC oilseed crop. Harvested area is estimated at 0.6 million hectares, down 0.1 million or 17 percent from last year's record. Harvested area has increased by a factor of 30 from 10 years ago. Italy produces 86 percent of the total EC soybean output.

Italian soybean plantings were virtually nonexistent in the early 1980's. Fostered by high EC subsidies and a generally depressed grain market, soybean area has been expanding rapidly. Soybean area in 1991 is expected to be lower than last year as the progressive recovery of corn prices during 1990/91 encouraged farmers to plant corn. The reduction should affect only the single crop, while the double crop share of soybeans is seen increasing to one-third of the total soybean area, compared to one-fourth of last year's area. Soybeans are grown almost exclusively in the Po Valley.

Production in Italy is estimated to be lower than last year as area declined significantly. Since the majority of the soybeans are irrigated, yields vary only slightly from year to year. This year's spring weather generally was cool and wet, but as summer arrived, favorable weather prevailed. Soybean production accounts for over 80 percent of Italy's total oilseed output.

A Changing Support Price Regime

This will be the final year during which the present oilseeds support price regime will operate. The price package adopted for 1991 by the EC Council will reduce oilseeds support levels by 1.5 percent and lower the premium for double-low rapeseed varieties from 2.5 ECU to 1.25 ECU per 100 kilograms. These two measures will lower the support price by about 5 percent from the previous year. Additional price reductions are expected in October once the overall EC crop estimate is determined and the price supports are discounted to reflect the Guaranteed Minimum Quantity (MGQ) levels. Given the volume of the estimated rapeseed crop this season, the additional price reduction under the MGQ will likely be substantial. The target price for rapeseed may be adjusted down by 30 percent or more, and down by 19 percent for soybeans. No additional adjustment for sunflowerseed is anticipated since output is expected to be below the MGQ.

In late July, the EC Commission submitted a new oilseeds price support plan to the EC Council of Ministers and the European parliaments. The present regime was found by the GATT to be inconsistent with the EC's GATT obligations. The new plan is expected to become effective with the 1992 rapeseed, soybeans, and sunflowerseed harvests (winter rapeseed 1991/92 crop, spring rapeseed 1992/93, and the soybean and sunflowerseed 1992/93 crop). The new plan provides producers with direct support payments based on area rather than EC overall production by commodity. The base area for establishing support is above 5.7 million hectares for all oilseeds combined, just below the record 5.9 million set in 1990/91. Per hectare payments will be set using ECU's per metric ton for areas with a predetermined Average Community Yield. Premiums and discounts will be determined for regional yield variations and payments will be made directly to producers rather than through the crushing industry as under the present regime. The Commission proposal is subject to the EC Council's approval, expected by October. To date, there has been mixed reaction from the individual countries on whether or not to accept the proposal.

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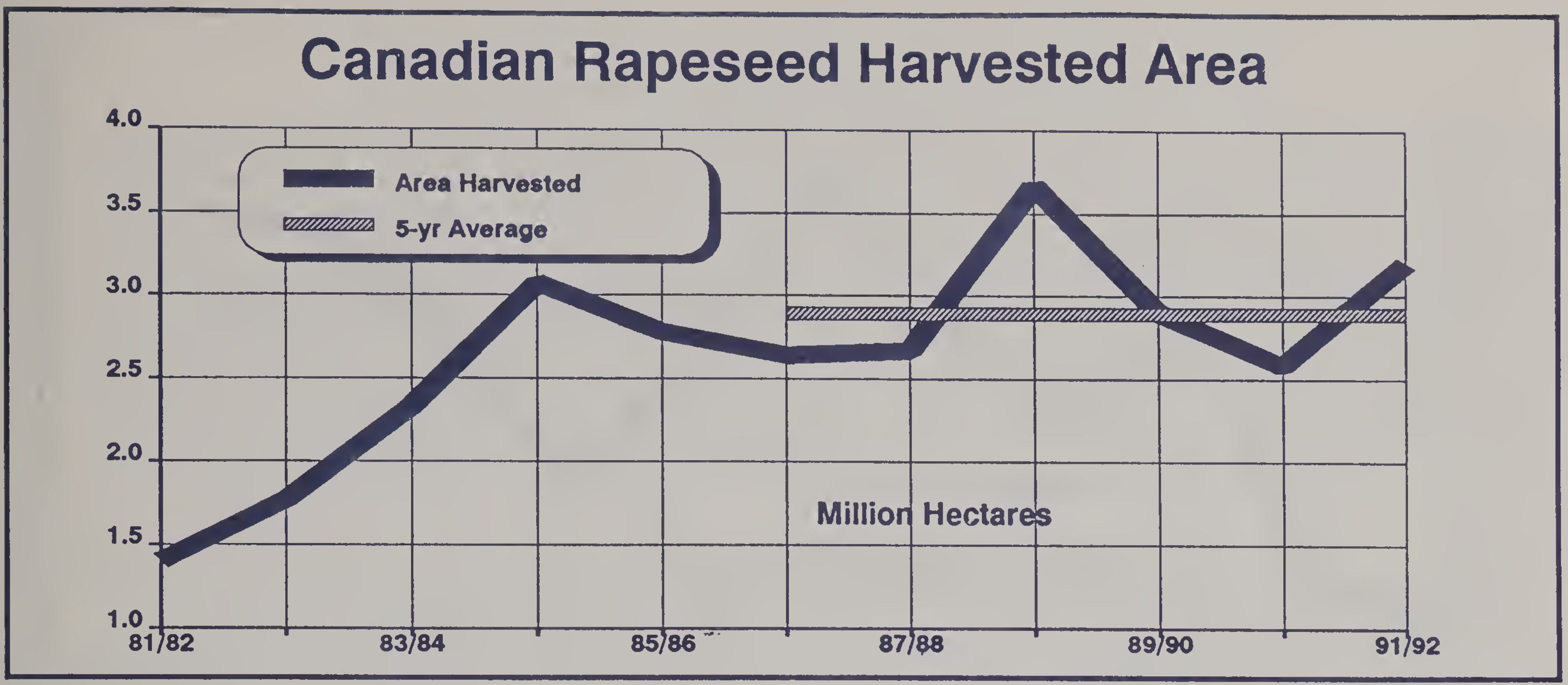
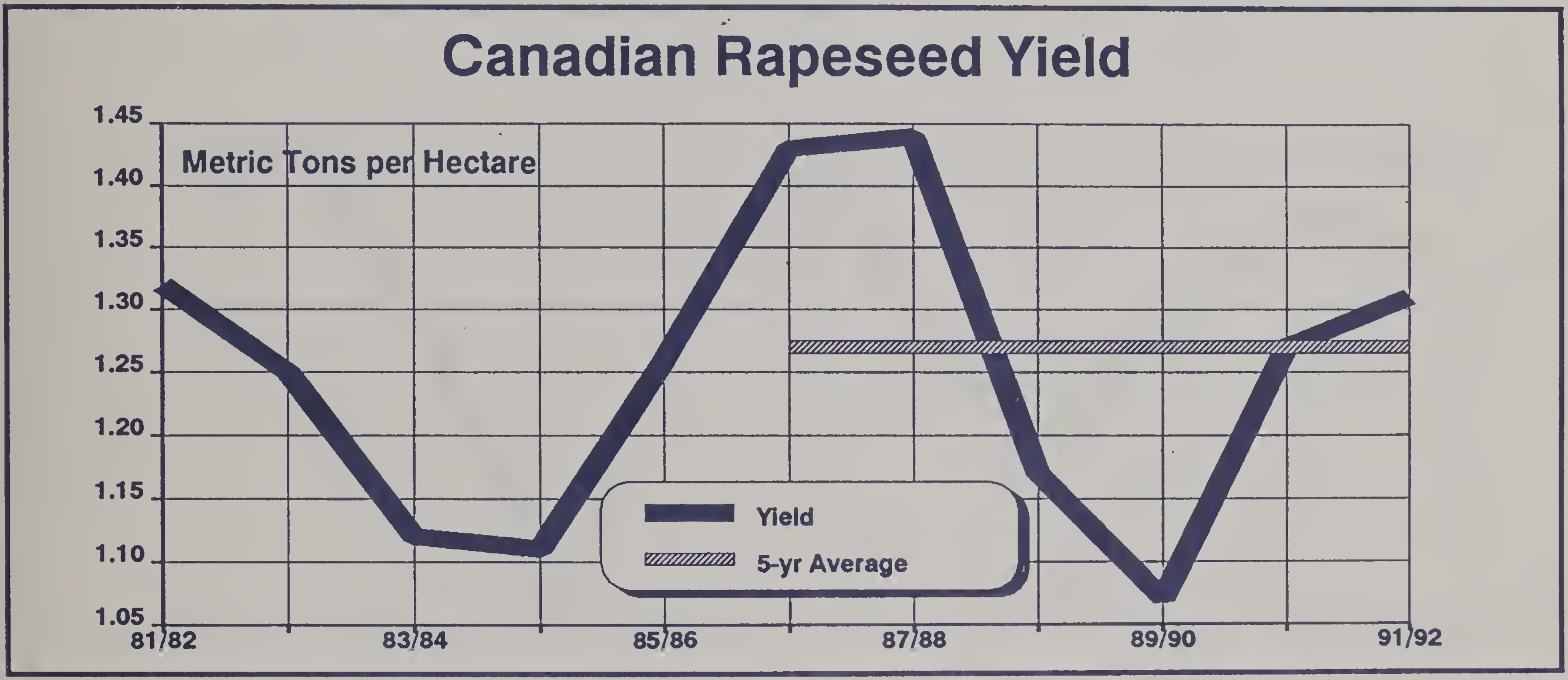
TABLE 10

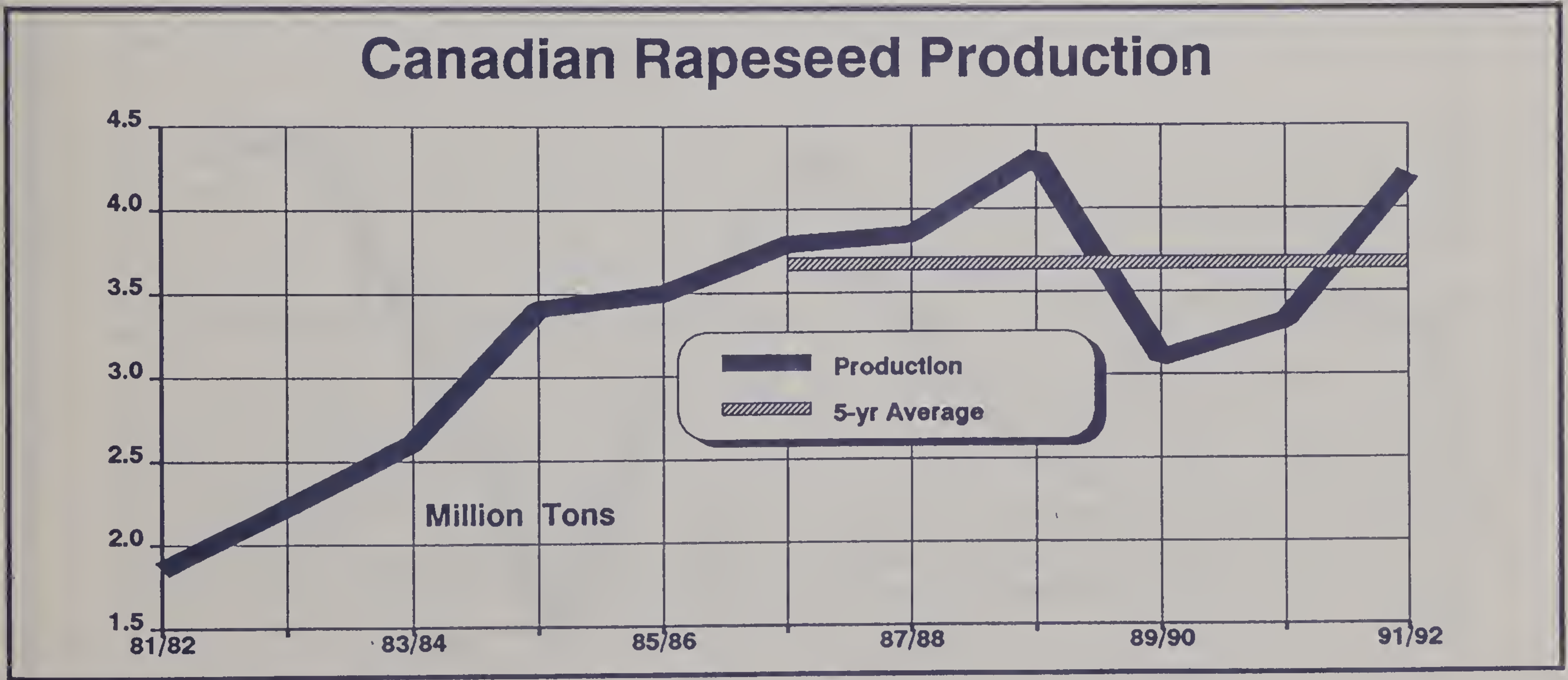
European Community Oilseed Production (1,000 mt and hectares)

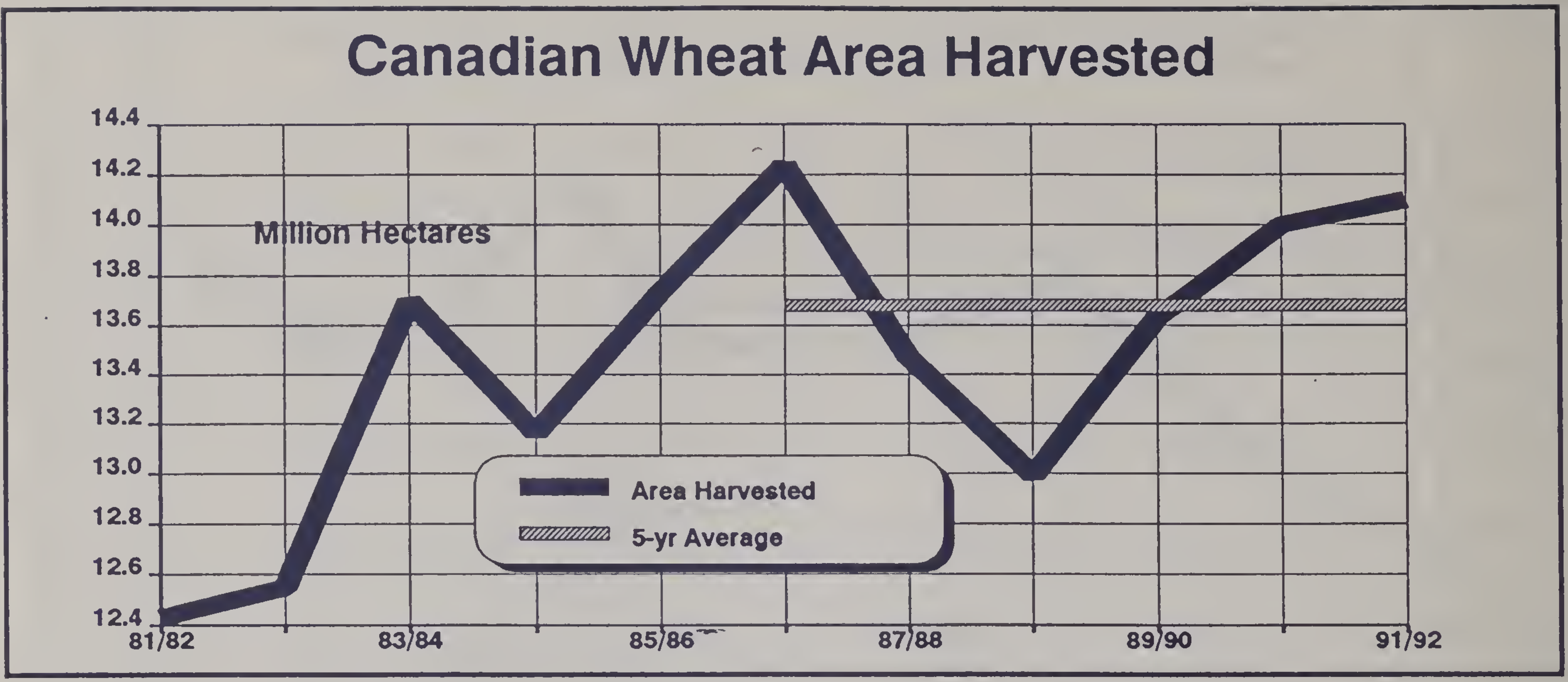
	1975/76	1976/77	1977/78	1978/79	1979/80	1980/81	1981/82	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91	1991/92
Rapeseed																	
AREA HARVESTED:																	
Belgium–Luxembourg	1	0	1	2	2	2	1	5	4	5	2	3	5	4	5	7	7
Denmark	72	44	39	47	65	103	132	152	162	191	217	227	250	199	231	270	295
France	261	282	275	253	223	400	469	476	463	430	461	388	740	869	633	688	686
Germany 1/	222	225	230	245	240	263	279	310	356	388	411	456	573	532	576	725	925
Ireland	0	0	0	1	0	1	2	3	4	4	4	7	4	4	4	5	5
Italy	1	1	1	1	1	1	1	0	1	2	6	23	28	23	16	17	16
Netherlands	14	12	11	10	7	8	11	11	13	13	10	6	10	7	6	8	7
Spain	0	2	4	4	8	8	25	19	16	10	9	9	8	9	12	24	12
United Kingdom	39	48	55	64	74	92	125	174	222	269	296	299	388	340	323	390	450
Total =	610	614	616	627	620	878	1,045	1,150	1,241	1,312	1,416	1,418	2,006	1,987	1,806	2,134	2,403
PRODUCTION:																	
Belgium–Luxembourg	2	0	1	2	2	2	1	10	10	11	6	8	15	13	15	22	22
Denmark	131	81	77	91	150	225	290	335	309	474	544	618	556	504	655	793	850
France	474	536	388	568	510	1,103	990	1,148	906	1,304	1,340	1,071	2,645	2,302	1,748	1,930	1,989
Germany 1/	562	542	590	649	522	687	648	843	859	967	1,184	1,337	1,665	1,640	1,880	2,153	2,765
Ireland	0	0	0	1	0	1	2	5	9	9	6	16	9	9	9	10	10
Italy	3	2	1	2	2	2	2	0	1	5	13	44	68	51	40	44	43
Netherlands	37	34	30	23	18	29	37	33	38	38	31	20	31	24	23	26	25
Spain	0	4	7	7	10	11	14	13	11	11	10	10	10	11	18	30	18
United Kingdom	61	111	142	155	198	300	325	580	565	925	895	940	1,353	1,040	953	1,200	1,350
Total =	1,270	1,310	1,236	1,498	1,412	2,360	2,309	2,967	2,708	3,744	4,029	4,064	6,352	5,594	5,341	6,208	7,072
Soybeans																	
AREA HARVESTED:																	
France	2	1	3	4	17	8	9	9	12	22	28	48	79	92	135	116	85
Germany 1/	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	2	4
Greece	0	0	0	0	0	0	0	0	0	0	0	1	2	3	8	7	6
Italy	0	0	0	0	0	0	3	3	25	36	94	232	481	432	477	550	465
Portugal	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
Spain	8	4	4	9	9	7	4	3	1	2	2	1	2	7	11	17	14
Total =	10	5	7	13	26	15	16	15	38	60	124	282	564	534	633	693	575
PRODUCTION:																	
France	2	2	4	4	16	14	18	16	25	31	46	85	186	228	300	245	187
Germany 1/	0	0	0	0	0	0	0	0	0	0	0	0	0	0	5	5	10
Greece	0	0	0	0	0	0	0	0	0	0	0	3	4	6	26	22	25
Italy	0	0	0	0	0	0	9	9	62	110	286	806	1,589	1,408	1,624	1,850	1,550
Portugal	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
Spain	14	6	8	17	15	14	6	5	2	4	5	2	4	13	27	42	35
Total =	16	8	12	21	31	28	33	30	89	145	337	896	1,783	1,655	1,982	2,165	1,808

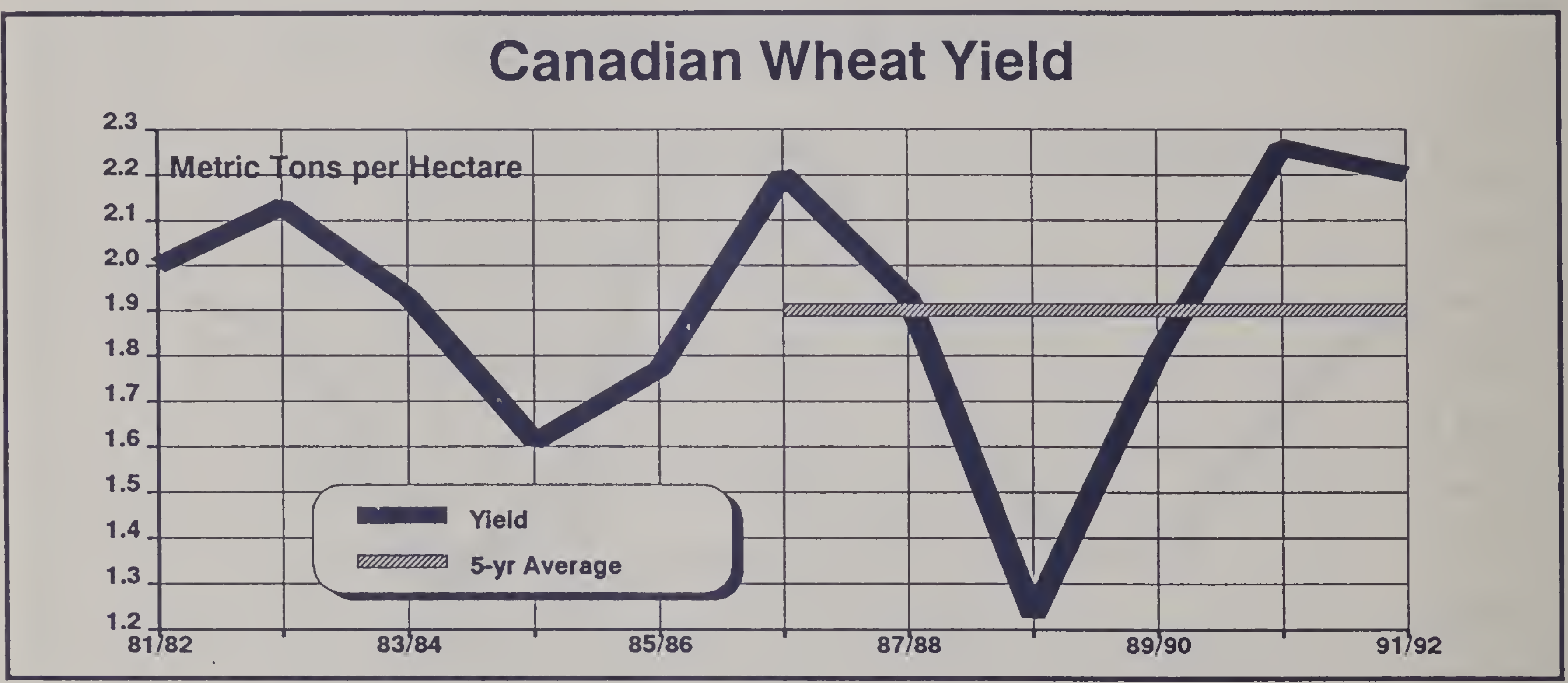
Continued

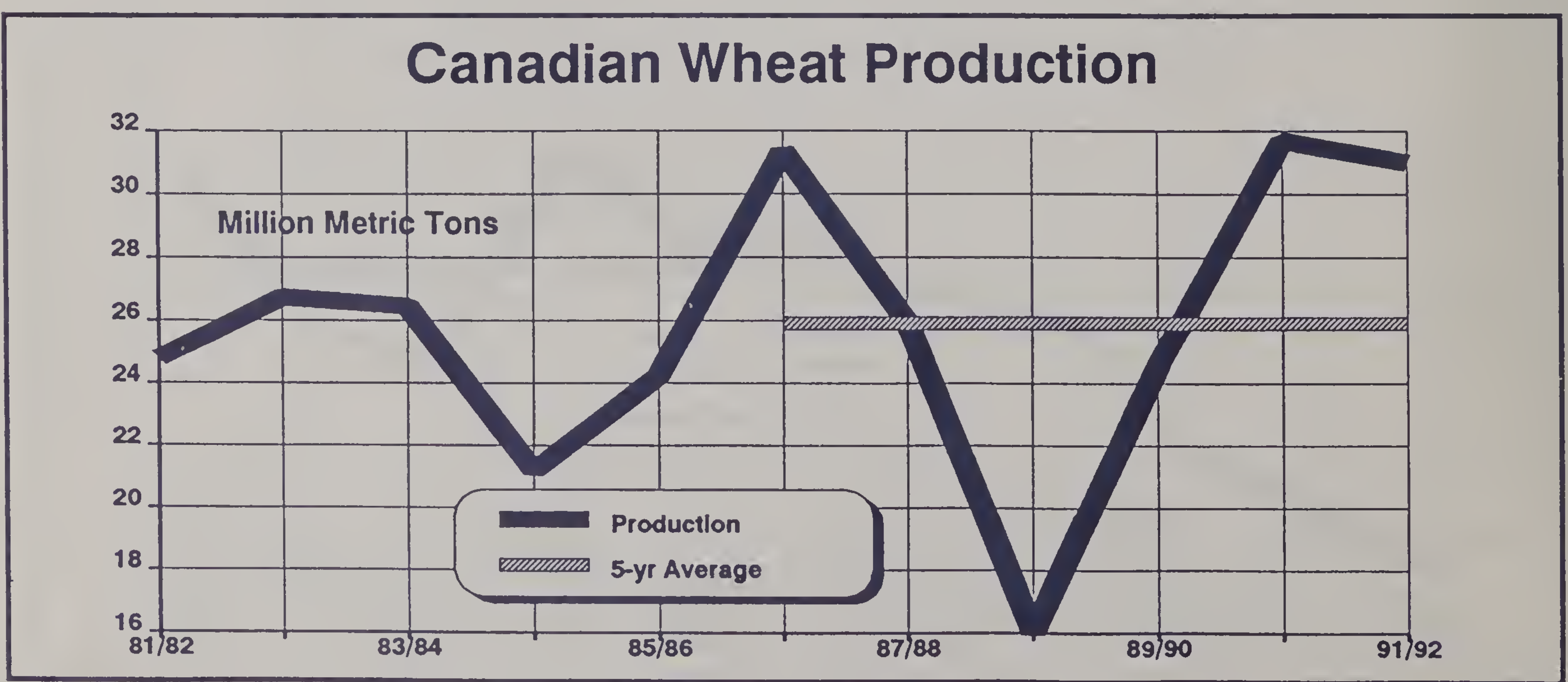

Canadian Rapeseed Harvested Area
Area Harvested
5-yr Average
Million Hectares
4.0
3.5
3.0
2.5
2.0
1.5
1.0
81/82
83/84
85/86
87/88
89/90
91/92


Canadian Rapeseed Yield
Metric Tons per Hectare
Yield
5-yr Average
1.45
1.40
1.35
1.30
1.25
1.20
1.15
1.10
1.05
81/82
83/84
85/86
87/88
89/90
91/92


Canadian Rapeseed Production
Production
5-yr Average
Million Tons
4.5
4.0
3.5
3.0
2.5
2.0
1.5
81/82
83/84
85/86
87/88
89/90
91/92







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Production Estimates & Crop Assessment Division, FAS,USDA

WORLD POULTRY MEAT PRODUCTION

World 1/ poultry meat production for 1991/92 is estimated to total 37.6 million tons in 1991, 4 percent above the 1990 level. Output is expected to rise 3 to 4 percent for 1992. Broiler production, the largest component of total poultry meat production, is estimated to total 25.3 million tons in 1991, up 3 percent from 1989. A 3 to 4 percent growth is forecast for 1992. Output of turkey meat in 1991 is estimated at 3.8 million tons, up 3 percent from 1990. Production is expected to rise 3 to 4 percent for 1992. World production of eggs, forecast at 567 billion, is nearly 3 percent above the 1990 level. An increase of about 3 percent is also anticipated for 1992. Strong growth in China accounts for most of the change in egg production at the global level.

In the United States, 1991 broiler production is expected to be 9.0 million tons, up 6 percent from last year as producers take advantage of continuing favorable broiler-feed price relationships. A slower rate of growth is forecast for 1992 as expected higher feed prices reduce producer returns. Canadian broiler production is forecast to grow about 4 percent in 1991 and 1992. Canada's Chicken Marketing Agency's increased allocations to meet rising demand may be too conservative. Much faster growth is forecast for British Columbia which opted not to participate in the national plan. Mexico's 1991 output of broilers is estimated at 750,000 tons, 14 percent above 1990 which in turn was up sharply from 1989. Increased consumer purchasing power and accompanying stronger demand, due in part to the Government's economic program, are given credit for the production increase. However, surpluses have developed and lower prices are forecast to slow the rate of increase for 1992.

In South America, Brazil's 1991 broiler production is estimated at 2.6 million tons, up 10 percent from 1990. A 5-percent increase is forecast for 1992. Brazil's current economic plan has resulted in stronger demand for poultry meat, as it is the least expensive meat. Stronger export demand also is providing some stimulus for the production increase. After falling sharply in 1988 and 1989, broiler production in Argentina recovered slightly in 1990. Stronger growth is expected in 1991 and 1992, although low beef prices continue to limit expansion in the poultry sector. After growing steadily for years and peaking at 375,000 tons in 1987, Venezuelan broiler output in 1990 was down to 224,000 tons with some recovery forecast for 1991 and 1992. Venzuela's poultry industry was put in a sharp downward cycle because the removal of subsidies on imported feed ingredients sharply raised costs, putting producers in a severe cost-price squeeze.

EC broiler production is estimated at 4.6 million tons, up 2 percent from 1990. A slightly slower rate of growth is forecast for 1992. French broiler production in 1991 is estimated at 1 million tons, up 4 percent with slower growth expected in 1992. Both domestic and export demand are growing moderately. Broiler production in the United Kingdom is expected to increase 5 percent in 1991, continuing the moderate expansion that started in 1990. The public health concerns that affected the industry for the past 2 years seem to have been put to rest. Italian broiler production is forecast to show little growth in 1991 and 1992, following 4 percent growth in 1990. Higher output in 1990 caused a moderate drop in producer prices. Consolidation in the Italian broiler industry is giving some cost economies, allowing limited expansion despite tight margins. Broiler production in the Netherlands is expected to expand 6 percent in 1991 and another 1 percent in 1992.

Increased exports to other EC countries are providing some incentive to Dutch producers. Spanish broiler production is forecast at 770,000 tons for both 1991 and 1992, 1 percent above the 1990 level. Broiler output in Germany is estimated to decline in 1991 as the poultry sector of the former German Democratic Republic adjusts to market conditions.

Broiler production in Eastern Europe is expected to decline 2 percent in 1991 as economic restructuring and loss of markets take their toll on the industry. In Hungary, a traditional exporter, rising costs have priced poultry out of both domestic and export markets. Poland's 1991 production of broilers is estimated at 185,000 tons, 3 percent above the low level of 1990. High feed prices on the supply side and plentiful pork on the demand side are likely to limit expansion of the poultry sector in the near future. After declining 6 percent in 1990, broiler output in Yugoslavia is expected to almost recover in 1991 as prospects for profitable production are described as generally favorable. Broiler meat production in the USSR is estimated at 1.75 million tons, down from last year despite a bumper 1990 grain harvest. With the current grain harvest expected to be down, output of broiler meat may slip further in 1992.

Japan's broiler production is forecast at 1.3 million tons for both 1991 and 1992. Despite growing demand, Japanese producers are having difficulty meeting foreign competition. In Thailand, rapid growth in the export market and moderate growth in the domestic market are expected to stimulate 1991 and 1992 production increases of 8 to 10 percent. In Taiwan, the continued rapid production growth in 1990 surpassed market needs and brought lower prices. Production growth slowed for a period of time in late 1990 and early 1991. However, with demand rising, rapid output growth is expected for the remainder of 1991 and 1992.

Output of total poultry meat in China is forecast at 3.6 million tons in 1991 and 4.0 million tons in 1992. Both increases are over 10 percent. Strong demand continues while feed prices remain reasonable, offering good prospects for profitable production. Output of poultry meat for 1991 in the Philippines is estimated at 300,000 tons, up 8 percent, with a similar rate of growth forecast for 1992. Demand is reported to be strong and feed prices are reasonable.

World 1991 turkey meat production is estimated at 3.8 million tons, up 3 percent from 1990, and is expected to grow 3 percent in 1992. U.S. producers, responding to a squeeze on returns following last year's 10 percent increase in feed prices, are expected to produce only 2 percent more turkey meat in 1991. Output is expected to be up 3 percent in 1992. EC production is forecast at 1.3 million tons in both 1991 and 1992. France, the largest EC producer, is forecast to produce 460,000 tons in 1991 and increase 4 percent in 1992. Growth of around 12 percent in 1990 caused prices to decline somewhat, but lower feed prices allowed production to continue to be profitable. Prospects for lower red meat prices may put even more pressure on producers in 1992. After declining in 1990, turkey production in the U.K. is expected to fully recover in 1991. With the current firm prices, many farmers view turkeys as a profitable addition to their operations. Continued expansion in domestic demand, due to both health concerns and lower prices, may have helped the

Italian industry expand in 1990 but lower prices offer little incentive to expand in 1991. Little growth in either production or demand is expected in 1992. Output of turkey meat in Germany is expected to total 170,000 tons in 1991 and 180,000 in 1992. Strong demand for heavy turkeys for further processing is a major factor behind the continued production growth.

World egg production in 1991 is forecast at 567.3 billion pieces, up 3 percent, primarily reflecting significant growth in China. Continued growth is forecast for 1992. In the United States, 1991 output is estimated to grow 1 percent, reflecting some recovery from the 1989 decline. After a year of little growth, Mexico's production of eggs in 1991 has moved sharply higher (9 percent), causing lower prices. Output in 1992 is forecast to increase only 2 percent. Brazil's egg output is up 7 percent in 1991 and is forecast to continue expanding in 1992 by 8 percent. Strong growth is forecast for Argentine egg production in both 1991 and 1992 as the domestic market takes more eggs. Venezuela's 1991 and 1992 egg production may show some recovery from the sharp declines of the recent past. The decline resulted from higher feed prices due to the ending of foreign exchange subsidies for feed inputs.

EC egg production in 1991 is estimated at 85.2 billion, 1 percent below the the 1990 level. Forecasts for 1992 indicate another small decline is likely as EC consumption continues for fall. Egg production for 1991 in Eastern Europe is expected to fall slightly. A declining economy and limited feed supplies are likely to keep output in the USSR in a downward pattern. After years of steady growth, Japan's 1991 and 1992 output of eggs is forecast to show only moderate expansion. China's output of eggs is expected to expand about 8 percent in both 1991 and 1992. Lower priced grain is providing some expansion incentive to meet the rapidly growing demand.

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1/ World refers to the total of selected countries. The number of countries varies by product.

TABLE 13

TOTAL POULTRY MEAT PRODUCTION IN SELECTED COUNTRIES
(1,000 Metric Tons)

COUNTRY/REGION	1987	1988	1989	1990 1/	1991 2/	1992 3/
Canada	646	656	659	701	725	750
Mexico	515	592	635	700	800	860
United States	9,105	9,426	10,105	10,878	11,387	11,838
NORTH AMERICA	10,266	10,674	11,399	12,279	12,912	13,448
Guatemala	74	78	83	94	99	102
Argentina	410	370	315	335	350	365
Brazil	1,865	1,997	2,139	2,416	2,643	2,780
Venezuela	413	373	253	225	251	261
SOUTH AMERICA	2,688	2,740	2,707	2,976	3,244	3,406
Belgium-Luxembourg	172	186	179	181	185	188
Denmark	113	117	128	131	134	138
France	1,393	1,434	1,550	1,651	1,700	1,720
Germany	546	576	603	599	600	620
Greece	148	150	154	160	161	161
Ireland	58	59	60	60	60	62
Italy	982	996	1,025	1,069	1,070	1,080
Netherlands	471	485	491	525	550	550
Portugal	197	205	207	213	220	226
Spain	790	829	831	836	840	840
United Kingdom	999	1,056	1,070	1,087	1,130	1,170
EC-12	5,869	6,093	6,298	6,512	6,650	6,755
Austria	75	75	75	78	80	81
Finland	27	28	31	33	36	38
Sweden	46	47	47	47	47	47
Switzerland	29	31	33	33	33	33
OTHER WEST EUROPE	177	181	186	191	196	199
Bulgaria	169	183	198	200	200	200
Czechoslovakia	181	211	216	211	210	210
Hungary	470	465	420	426	405	430
Poland	343	351	348	328	340	352
Romania	425	370	365	425	410	349
Yugoslavia	323	330	320	295	308	315
EAST EUROPE	1,911	1,910	1,867	1,885	1,873	1,856
USSR	3,126	3,184	3,300	3,300	3,250	3,200
Iraq	211	235	225	200	60	80
Israel	157	178	171	173	181	184
Kuwait	19	20	21	18	5	10
Saudi Arabia	236	248	240	265	275	290
Syria	75	80	85	90	90	90
Turkey	221	236	254	269	284	300
UAE	14	14	14	14	14	14
Yemen	70	80	85	87	95	100
MIDDLE EAST	1,003	1,091	1,095	1,116	1,004	1,068

(CONTINUED)

TABLE 13 (Continued)

TOTAL POULTRY MEAT PRODUCTION IN SELECTED COUNTRIES

(1,000 Metric Tons)

COUNTRY/REGION	1987	1988	1989	1990 1/	1991 2/	1992 3/
EGYPT	319	279	254	235	225	215
SOUTH AFRICA	523	545	552	563	580	595
INDIA	206	221	289	334	368	400
China	2,040	2,744	2,840	3,229	3,600	4,000
Hong Kong	40	35	34	32	32	31
Japan	1,465	1,471	1,482	1,451	1,435	1,446
Korea, Republic of	144	153	158	175	182	190
Philippines	215	235	263	279	300	324
Singapore	62	63	58	56	58	60
Taiwan	400	418	462	476	490	515
Thailand	464	511	553	595	645	700
OTHER ASIA	4,830	5,630	5,850	6,293	6,742	7,266
Australia	403	401	406	419	440	463
New Zealand	47	50	55	62	60	61
OCEANIA	450	451	461	481	500	524
WORLD 4/	31,442	33,077	34,341	36,259	37,643	39,034

1/ Preliminary. 2/ Estimate. 3/ Forecast. 4/ Total includes 51 countries.

TABLE 14

BROILER MEAT PRODUCTION IN SELECTED COUNTRIES
(1,000 Metric Tons)

COUNTRY/REGION	1987	1988	1989	1990 1/	1991 2/	1992 3/
Canada	531	537	539	572	595	615
Mexico	395	490	590	660	750	820
United States	7,075	7,342	7,903	8,464	8,951	9,320
NORTH AMERICA	8,001	8,369	9,032	9,696	10,296	10,755
Brazil	1,800	1,947	2,084	2,356	2,580	2,715
Argentina	380	340	300	305	320	335
Venezuela	375	370	252	224	250	260
SOUTH AMERICA	2,555	2,657	2,636	2,885	3,150	3,310
Belgium-Luxembourg	139	150	144	147	152	154
Denmark	98	102	110	116	118	120
France	830	844	898	959	1,000	1,020
Germany	322	327	355	334	315	325
Greece	133	132	136	129	130	132
Ireland	38	39	40	40	40	40
Italy	593	593	608	632	632	640
Netherlands	390	396	406	433	461	465
Portugal	165	169	178	182	188	193
Spain	725	757	772	766	770	770
United Kingdom	760	801	770	798	835	860
EC-12	4,193	4,310	4,417	4,536	4,641	4,719
Austria	60	60	59	60	61	61
Finland	23	24	27	28	31	33
OTHER WEST EUROPE	83	84	86	88	92	94
Czechoslovakia	162	184	162	160	158	158
Hungary	400	368	330	290	260	285
Poland	192	210	210	180	185	190
Romania	330	300	290	400	390	350
Yugoslavia	260	265	258	243	254	260
EAST EUROPE	1,344	1,327	1,250	1,273	1,247	1,243
USSR	1,720	1,760	1,820	1,800	1,750	1,700
Iraq	200	223	214	190	30	40
Israel	101	114	115	121	127	127
Saudi Arabia	236	248	240	263	273	285
Turkey	130	150	180	260	275	290
MIDDLE EAST	667	735	749	834	705	742
EGYPT	259	219	195	185	170	160

(CONTINUED) p.55

TABLE 10 (Continued)

European Community Oilseed Production (1,000 mt and hectares)

	1975/76	1976/77	1977/78	1978/79	1979/80	1980/81	1981/82	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91	1991/92
Sunflowerseed																	
AREA HARVESTED:																	
France	61	45	38	39	83	98	155	283	416	476	591	849	965	951	907	1,135	1,023
Germany 1/	0	0	0	0	0	0	0	0	0	0	0	2	8	10	14	18	30
Greece	2	2	2	2	2	3	3	4	9	42	80	79	90	42	26	18	15
Italy	25	25	31	23	34	32	43	51	72	83	94	104	200	165	134	146	125
Portugal	12	15	10	19	23	25	23	20	25	38	40	44	43	75	66	50	60
Spain	792	507	545	584	638	668	750	870	950	1,007	1,215	1,070	994	921	977	1,180	1,000
Total =	892	594	626	667	780	826	974	1,228	1,472	1,646	2,020	2,148	2,300	2,164	2,124	2,547	2,253
PRODUCTION:																	
France	99	62	69	76	159	227	398	650	828	958	1,477	1,902	2,508	2,335	2,125	2,370	2,200
Germany 1/	0	0	0	0	0	0	0	0	0	0	0	4	24	30	45	55	90
Greece	2	2	2	2	2	5	4	8	20	67	163	164	145	75	53	29	36
Italy	46	50	51	42	55	57	86	91	131	146	162	255	450	365	340	301	275
Portugal	8	9	7	15	12	23	8	13	28	28	29	33	28	58	45	34	50
Spain	416	312	388	470	504	495	405	750	750	1,100	990	920	1,006	1,123	929	1,300	1,100
Total =	571	435	517	605	732	807	901	1,512	1,757	2,299	2,821	3,278	4,161	3,986	3,537	4,089	3,751
Other Oilseeds 2/																	
AREA HARVESTED:																	
Belgium–Luxembourg	9	9	10	7	7	7	6	9	7	10	11	8	10	11	12	12	10
France	26	43	46	54	50	46	30	38	39	47	53	41	47	52	56	55	37
Greece	136	149	183	168	142	141	129	113	168	192	203	205	211	252	288	286	233
Spain	64	58	80	45	52	65	74	51	42	62	66	81	81	136	69	84	81
Italy	9	9	15	14	11	9	9	5	5	5	5	5	4	2	2	2	2
Netherlands	5	5	6	5	4	4	3	4	4	4	4	3	4	5	6	7	8
United Kingdom	0	0	0	0	0	0	0	0	0	0	9	11	8	14	18	37	65
Total =	249	273	340	293	266	272	251	220	265	320	351	354	365	472	451	483	440
PRODUCTION:																	
Belgium–Luxembourg	6	8	7	7	7	6	5	7	6	8	8	6	8	8	7	8	8
France	32	36	43	31	42	35	18	31	22	29	34	24	22	31	30	35	22
Greece	262	238	309	220	174	195	200	140	190	243	278	327	300	400	413	340	340
Spain	93	84	101	71	89	118	128	107	83	113	112	134	131	184	102	121	104
Italy	9	11	13	10	10	9	9	6	6	6	7	3	2	2	2	2	2
Netherlands	5	5	6	5	4	4	4	4	3	4	4	5	5	5	7	8	9
United Kingdom	0	0	0	0	0	0	0	0	0	0	7	8	10	26	30	68	120
Total =	407	382	479	344	326	367	364	295	310	403	450	507	478	656	591	582	613
Total Harvested Area	1,761	1,486	1,589	1,600	1,692	1,991	2,286	2,613	3,016	3,338	3,911	4,202	5,235	5,157	5,014	5,857	5,671
Total Production	2,264	2,135	2,244	2,468	2,501	3,562	3,607	4,804	4,864	6,591	7,637	8,745	12,774	11,891	11,451	13,044	13,244

1/ Data combines former eastern and western Germany. 2/ Includes cottonseed, flaxseed, and peanuts.

FIELD TRIP REPORT ON CHINESE COTTON SITUATION

Personnel from the USDA's Foreign Agricultural Service traveled in the primary cotton producing provinces of China from July 15 through August 3, 1991. Travel through the provinces of Shandong, Hebei, Henan, and Xinjiang focused on cotton cultivation, the current condition and likely 1991/92 production in these provinces. These four provinces account for 65 percent of China's harvested cotton area. The USDA August 1991 estimate of China's 1991/92 cotton production and harvested area stands at 22.0 million 480-pound bales and 6.0 million hectares, respectively.

Shandong

Shandong is the largest cotton producing province, boasting a reported cotton area of 1.467 million hectares for 1991/92. Farmers and Government officials indicated that yields this year are likely to be slightly lower than the 938 kilograms per hectare estimated for 1990/91. The 1991/92 yield most frequently quoted by the provincial agricultural bureau was 825 kilograms per hectare. For the fields visited, cotton plants were in good to excellent condition with numerous bolls on each plant.

Shandong has a favorable climate for cotton with long days and high summer temperatures. There are approximately 200 frost free days. Rainfall averages 22 to 24 inches per year with 70 percent falling from July through September. Little rainfall occurs during the harvest period. Cotton cultivation is centered along the Yellow River and in the western and northern regions of the province.

Half of the cotton area is inter-cropped. The most frequent inter-cropping patterns are: 3 rows of wheat and 1 row of cotton or 4 rows of wheat and 2 rows of cotton. Two types of cotton are produced: spring cotton and summer cotton. Spring cotton is inter-cropped with wheat while the summer type is planted into the stubble after wheat harvest. Farmers plant cotton in 3 ways: direct seeding, seeding into plastic sheets, and transplanting seedlings. All three methods are used for spring cotton, while only direct seeding and transplanting are employed for summer cotton. Approximately 60 percent of the cotton is irrigated in this province.

Spring cotton is planted by April 15, while summer cotton is usually planted around May 20, and both are harvested in the early part of October. Farmers pick the cotton by hand several times during the harvest period and dry the raw cotton for 2 to 3 days in the sun. All cotton is of the upland type.

Hebei

For 1991/92, 920,000 hectares were reportedly sown to cotton, of which 167,000 were inter-cropped. Although the planted area and use of inputs were increased over 1990/91, farmers and Government officials visited said that output may be little changed from a year ago because of poor weather. Much cotton was re-seeded due to wet and cool weather during April and May, while hail storms damaged the crop later in the season. At this time there were no yield estimates available.

New land was brought under cotton cultivation through the efforts of agricultural leaders. Farm leaders at the provincial level worked with producers teaching them new production technology. The central government provided farmers with free plastic sheeting while the provincial government issued interest free loans for irrigation systems. Both the central and provincial governments increased the amount of insecticides and fertilizers allotted to farmers.

Henan

For 1991/92, the area planted to cotton is in excess of 900,000 hectares with average yields estimated at 825 kilograms per hectare. For the fields visited, cotton plants appeared in good to excellent condition with squares, flowers, and bolls on most plants. Producer and Government representatives in the regions visited said that conditions this year are not as good as last year as a minor drought in the northern part of the province slowed crop maturity. This year's production could equal the 1990 crop since the area planted to cotton is reportedly larger. Higher prices are reported to be the incentive for expanded area. Also, cotton offers higher returns that other crops.

Two types of cotton are grown in the province: slow maturing varieties called spring cotton and early maturing varieties known as summer cotton. Spring cotton is usually planted around April 20, with summer cotton planted in the last 10 days of May. Spring cotton is inter-cropped with wheat while summer cotton is planted after the wheat harvest in May. Space is left in the field for spring cotton when the winter wheat is planted in the fall. After the wheat is harvested in early May, summer cotton is planted into the wheat stubble. Both types of cotton are transplanted as seedlings. All cotton varieties are upland types. In Henan, 60 percent of the cotton is irrigated using water supplied by ground wells and a system of canals from the Yellow River.

Both types of cotton are harvested at roughly the same time. Harvest occurs from the last 10 days of September to the middle of October. Cotton is usually picked 7 or 8 times and dried under the sun for 2 to 3 days.

Xinjiang

Xinjiang produces both upland and extra long staple (ELS) cotton: 90 percent of the total output is upland while 10 percent is ELS. Both types are high grade because of long, hot, cloudless days and short nights. The areas of cotton cultivation are located in the northern, eastern, and southern parts of the province. Farmers and Government officials reported that the current growing season is good with sown area said to be 467,000 hectares with average yields estimated at 975 kilograms per hectare. Cotton appears in good to excellent condition with squares, flowers, bolls, and open bolls. However, the majority of plants have squares and flowers.

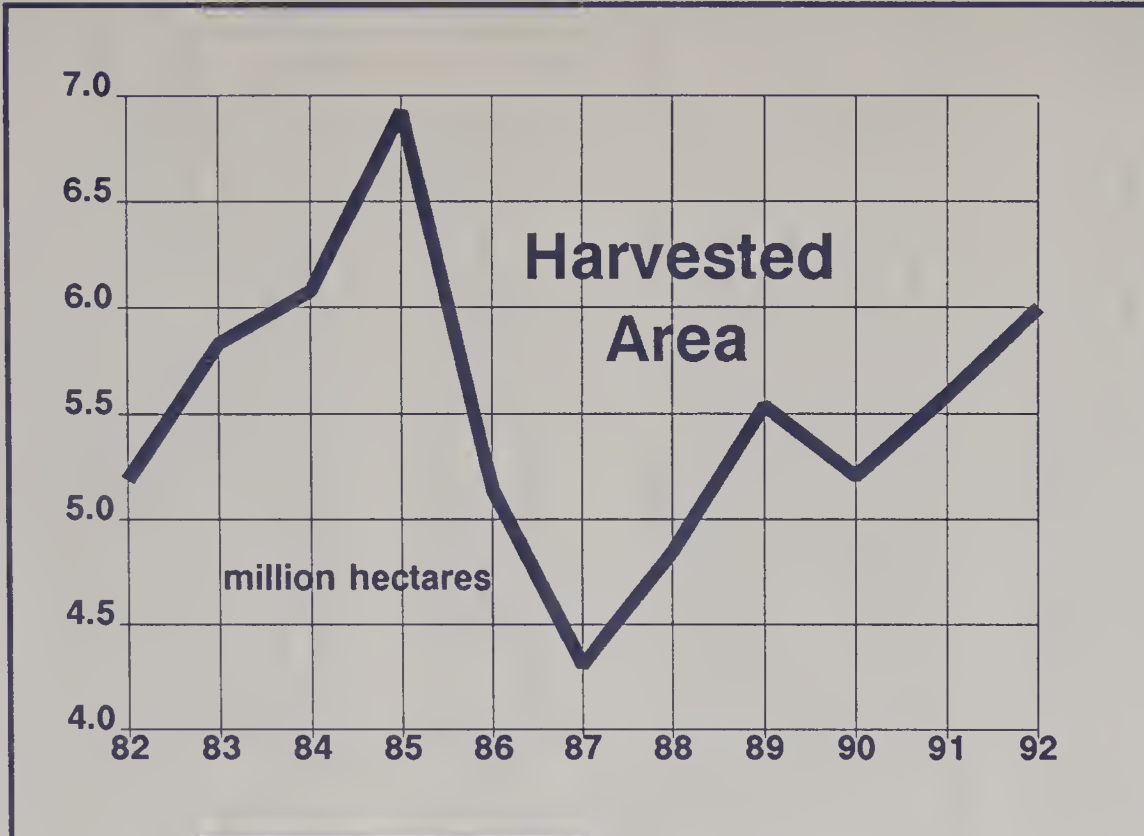
The province averages around 3 inches of annual rainfall, receiving 7 inches in the north, 1 inch in the east, and 2 inches in the south. Because of the light rainfall, snow melt from the surrounding mountains is used for irrigation. Water is conveyed by underground canals into reservoirs and then is directed by a series of water gates and stone-lined canals. A secondary system of plastic sheet-lined ditches conveys the water to the field where it is lifted, by gasoline pumps, to flood the field. Farmers said little fertilizer is used because the land is highly fertile.

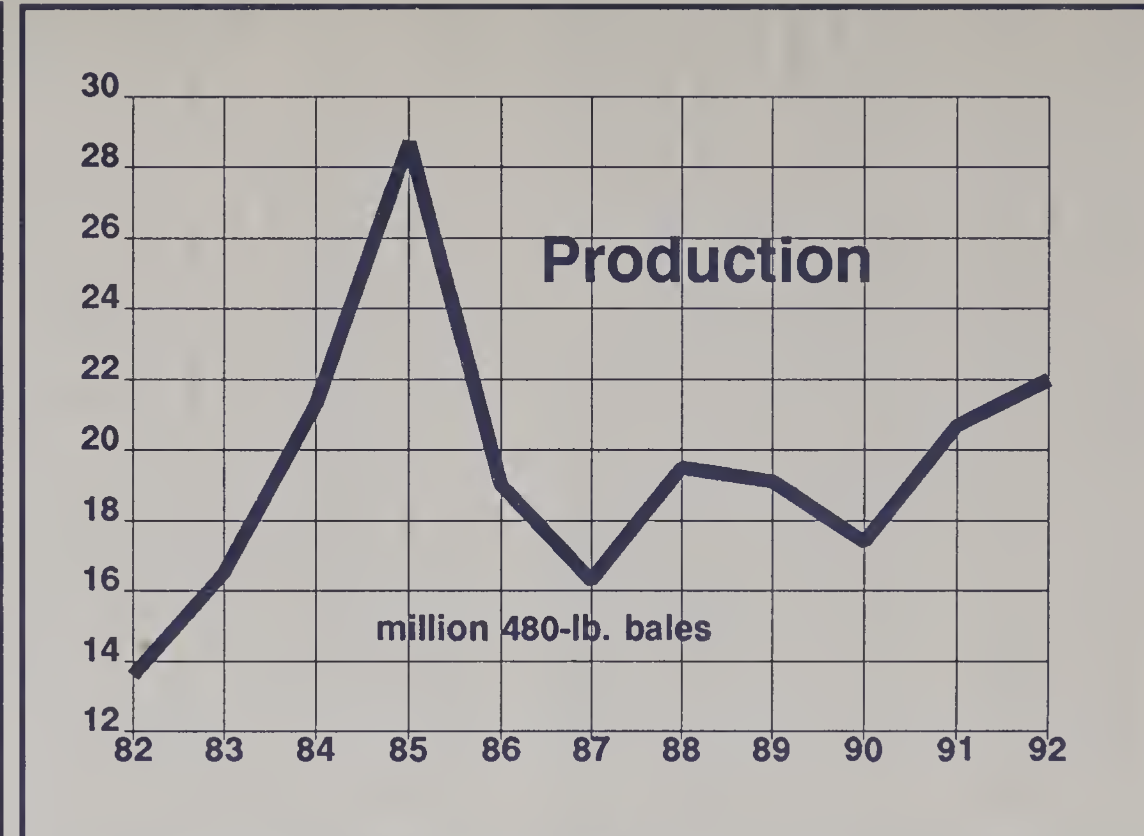
During the April planting season, the crop is usually sown through plastic sheets or is planted and then covered with sheeting. The latter method requires the farmer to cut holes in the plastic as the cotton germinates. The plastic sheets are used to lengthen the growing season by allowing early planting and to conserve soil moisture. The major harvest season is during September and November, although operations may begin in late August and run through December. Cotton is picked 10 to 15 times during the harvest season.

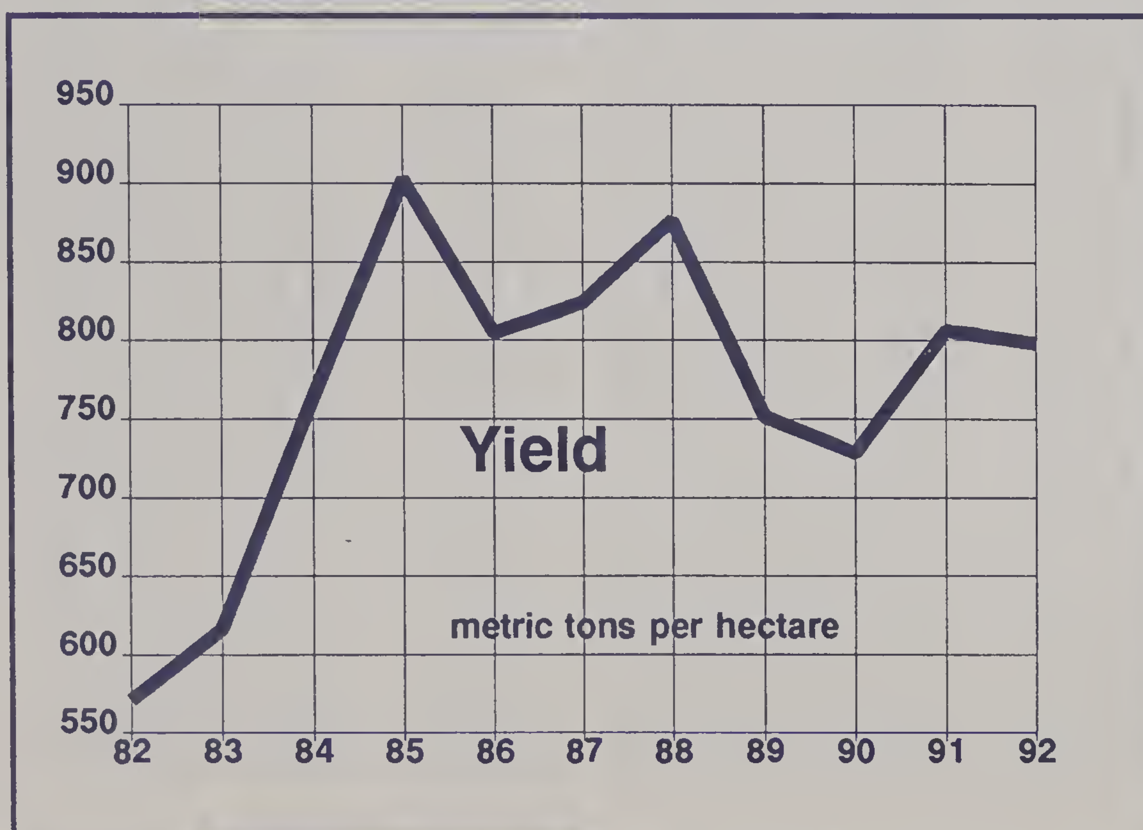
Ron Roberson (202) 382-8879

CHART 1

China Cotton Situation







China Cotton Data

	Production (mil.bales)	Area (mil.ha)	Yield (mt/ha)
1981/82	13.2	5.2	571
1982/83	16.5	5.8	616
1983/84	21.3	6.1	763
1984/85	28.7	6.9	903
1985/86	19.0	5.1	805
1986/87	16.3	4.3	824
1987/88	19.5	4.8	827
1988/89	19.1	5.5	751
1989/90	17.4	5.2	728
1990/91	20.7	5.6	807
1991/92	22.0	6.0	798

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CANADIAN WHEAT AND RAPESEED PRODUCTION

USDA Foreign Agricultural Service (FAS) personnel traveled in the major wheat and rapeseed producing areas of the Canadian Prairie Provinces (Manitoba, Saskatchewan, and Alberta) during early August 1991. The following is the result of discussions with producers, elevator managers, trade, industry, and Canadian government officials.

Generally excellent growing conditions in the Prairie Provinces are expected to produce an estimated near record 31.0-million-ton wheat crop and 4.2-million-ton rapeseed crop. May and June rainfall across the prairies was much heavier than last year; however, conditions from mid-July through early August have been drier. Last year, timely rains and beneficial harvest weather produced a record wheat crop and above average yield for rapeseed. With the announcement of Canada's new Gross Revenue Insurance Program (GRIP), producers expanded wheat and rapeseed area more than earlier expected in order to take advantage of the revenue incentives.

Wheat: Wheat production for 1991/92 is estimated at 31.0 million tons, down 2 percent from last year's record. The Prairie Provinces produce nearly 95 percent of Canada's wheat, nearly all of which is spring wheat and durum. Most of Canada's winter wheat is grown in Ontario province and usually comprises less than 5 percent of the total wheat crop. Initial reports indicate that producers in Saskatchewan planted 3 percent more wheat this year than last year, nearly 60 percent of the total Canadian wheat area. Alberta and Manitoba are seen maintaining their area contribution at 22 percent and 15 percent, respectively. Total estimated area this year increased from 14.0 million hectares to 14.1 million as farmers responded to revenue incentives of the GRIP. Even though international wheat prices were low at planting, GRIP probably enticed farmers to summer fallow or to plant additional wheat and/or rapeseed, as opposed to alternative crops. Inputs, such as fertilizer and pesticides, are expected to be used at last year's levels.

Favorable 1991 growing conditions are expected to produce the third largest wheat crop. In Saskatchewan, throughout the growing season, precipitation was much above normal with the exception of the northeast where rainfall was slightly below normal. Most of Saskatchewan's rain came in May and June, thereby promoting vigorous growth. In Manitoba, early planted wheat is now being harvested. Initial reports indicate "disappointing" yields, but producers and elevator managers anticipate higher yields once the "main" harvest begins. In Alberta, wheat appears to be in good condition, although rain is needed to maximize grain filling.

Currently, most of the wheat is at the filling-to-ripening stages and harvest begins in full swing near the end of August. There is some evidence of disease, insect damage, and lodging, but the crop generally is in good condition.

Rapeseed: Rapeseed production for 1991/92 is estimated at a record 4.2 million tons, up 28 percent from last year. The Prairie Provinces produce nearly all of Canada's rapeseed crop. Initial reports indicate that rapeseed area increased 24 percent from last year, to 3.2 million hectares. Saskatchewan producers plant about 43 percent of the total rapeseed area, followed by Alberta at 38 percent, and Manitoba at 16 percent. Again, incentives under GRIP may have made rapeseed an attractive alternative this year.

An increase in area, coupled with generally good weather is expected to boost production. In Saskatchewan, wet weather has caused some low areas to flood. Normally, the low areas are higher yielding; however, above average rainfall may have reduced yields or caused low lying areas to be unharvestable. This condition may be offset by higher yields from the normally drier areas. In Alberta, after a wet spring, rains tapered off in July and additional moisture is now needed to finish the crop. In Manitoba, the rapeseed crop is expected to yield close to last year's level. In 1990/91, Manitoba had the highest yield of the Prairie Provinces.

Presently, rapeseed is at the pod filling stage and harvesting is expected to begin toward the end of August. Wet weather in some areas of Manitoba and Saskatchewan has caused an increased incidence of disease, such as blackleg and sclerotinia. Lodging has also been reported, but not of any significance. Elevator managers and producers indicated that the use of inputs was close to last year's levels.

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TABLE 11

Canadian Wheat: Area, Yield, and Production

	AREA HARVESTED (1,000 Ha.)	*YIELD* (MT/Ha.)	*PRODUCTION* (1,000 MT)
1981/82	12,427	2.00	24,803
1982/83	12,554	2.13	26,737
1983/84	13,697	1.93	26,465
1984/85	13,158	1.61	21,188
1985/86	13,729	1.77	24,252
1986/87	14,239	2.20	31,378
1987/88	13,473	1.93	25,950
1988/89	12,987	1.23	15,995
1989/90	13,627	1.80	24,578
1990/91	14,000	2.26	31,700
1991/92	14,100	2.20	31,000

TABLE 12

Canadian Rapeseed: Area, Yield, and Production

	AREA HARVESTED (1,000 Ha.)	*YIELD* (MT/Ha.)	*PRODUCTION* (1,000 MT)
1981/82	1,402	1.32	1,849
1982/83	1,777	1.25	2,225
1983/84	1,334	1.12	2,609
1984/85	3,071	1.11	3,412
1985/86	2,783	1.26	3,498
1986/87	2,641	1.43	3,787
1987/88	2,671	1.44	3,847
1988/89	3,672	1.17	4,311
1989/90	2,904	1.07	3,096
1990/91	2,582	1.27	3,281
1991/92	3,200	1.31	4,200

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BROILER MEAT PRODUCTION IN SELECTED COUNTRIES
(1,000 Metric Tons)

COUNTRY/REGION	1987	1988	1989	1990 1/	1991 2/	1992 3/
SOUTH AFRICA	444	467	480	494	507	525
Hong Kong	29	24	23	22	22	21
Japan	1,340	1,346	1,355	1,332	1,315	1,325
Singapore	52	52	48	45	47	49
Taiwan	286	316	351	362	375	400
Thailand	464	498	538	575	620	670
OTHER ASIA	2,171	2,236	2,315	2,336	2,379	2,465
AUSTRALIA	349	360	365	377	396	417
WORLD 4/	21,786	22,524	23,345	24,504	25,333	26,130

1/ Preliminary. 2/ Estimate. 3/ Forecast. 4/ Includes 39 countries.

TABLE 15

TURKEY MEAT PRODUCTION IN SELECTED COUNTRIES
(1,000 Metric Tons)

COUNTRY/REGION	1987	1988	1989	1990 1/	1991 2/	1992 3/
Canada	115	119	120	129	130	135
Mexico	25	14	9	8	8	8
United States	1,739	1,796	1,944	2,147	2,185	2,260
NORTH AMERICA	1,879	1,929	2,073	2,284	2,323	2,403
BRAZIL	55	50	55	60	63	65
Belgium-Luxembourg	6	6	6	4	4	4
Denmark	3	2	3	3	3	4
France	308	332	387	432	460	480
Germany	79	96	118	145	170	180
Greece	3	3	3	3	3	3
Ireland	16	16	16	16	16	16
Italy	242	250	257	279	280	285
Netherlands	26	27	27	30	33	34
Portugal	28	28	29	30	31	32
Spain	20	21	21	29	32	33
United Kingdom	200	210	230	223	230	232
EC-12	931	991	1,097	1,194	1,262	1,303
Poland	15	15	15	15	15	15
Yugoslavia	15	15	12	11	12	12
EAST EUROPE	30	30	27	26	27	27
USSR	110	115	120	90	80	80
ISRAEL	46	55	56	52	54	57
WORLD 4/	3,051	3,170	3,428	3,706	3,809	3,935

1/ Preliminary. 2/ Estimate. 3/ Forecast. 4/ Total includes 20 countries.

August 1991 Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 16

EGG PRODUCTION IN SELECTED COUNTRIES
(Million Pieces)

COUNTRY/REGION	1987	1988	1989	1990 1/	1991 2/	1992 3/
Canada	5,706	5,721	5,719	5,661	5,620	5,575
Mexico	18,039	17,859	17,950	18,040	19,840	20,200
United States	70,418	69,410	67,174	67,919	68,572	68,940
NORTH AMERICA	94,163	92,990	90,843	91,620	94,032	94,715
Argentina	3,300	3,300	3,350	3,900	4,350	4,650
Brazil	15,400	14,850	12,174	13,454	14,390	15,585
Venezuela	2,585	2,700	2,600	1,146	1,381	1,400
SOUTH AMERICA	21,285	20,850	18,124	18,500	20,121	21,635
Belgium-Luxembourg	2,908	2,830	2,724	2,941	2,900	2,850
Denmark	1,316	1,366	1,410	1,409	1,390	1,380
France	14,540	15,300	15,050	14,629	14,800	14,800
Germany	17,995	17,960	17,794	16,800	15,200	15,200
Greece	2,480	2,485	2,507	2,566	2,560	2,570
Ireland	640	640	640	640	640	640
Italy	10,743	11,234	11,223	11,454	11,625	11,700
Netherlands	10,930	10,761	10,660	10,799	11,300	11,300
Portugal	1,587	1,633	1,520	1,590	1,620	1,652
Spain	10,500	10,856	10,140	10,659	10,700	10,700
United Kingdom	13,300	13,500	12,275	12,352	12,485	12,400
EC-12	86,939	88,565	85,943	85,839	85,220	85,192
Austria	1,818	1,757	1,695	1,664	1,697	1,680
Finland	1,370	1,304	1,288	1,232	1,105	1,070
Switzerland	690	708	693	635	640	640
OTHER WEST EUROPE	3,878	3,769	3,676	3,531	3,442	3,390
Bulgaria	2,846	2,850	2,850	2,850	2,850	2,850
Czechoslovakia	5,544	5,596	5,628	5,665	5,400	5,350
Hungary	4,237	4,695	4,250	4,300	4,300	4,300
Poland	7,966	8,220	8,200	7,649	7,800	8,000
Romania	8,000	7,650	7,600	7,100	6,900	6,800
Yugoslavia	4,922	4,972	4,700	4,566	4,680	4,730
EAST EUROPE	33,515	33,983	33,228	32,130	31,930	32,030
USSR	81,917	85,150	84,600	82,000	81,500	80,000
Iraq	1,482	1,600	1,500	1,300	800	1,000
Israel	1,674	1,902	1,898	1,843	1,877	1,970
Saudi Arabia	2,071	2,765	2,800	2,900	2,985	3,060
Turkey	6,100	6,200	7,200	7,500	7,800	8,100

(CONTINUED)

TABLE 16 (Continued)

EGG PRODUCTION IN SELECTED COUNTRIES
(Million Pieces)

COUNTRY/REGION	1987	1988	1989	1990 1/	1991 2/	1992 3/
MIDDLE EAST	11,327	12,467	13,398	13,543	13,462	14,130
Algeria	2,875	3,200	3,400	3,470	3,600	3,650
Egypt	3,060	2,840	3,000	3,200	2,950	2,950
NORTH AFRICA	5,935	6,040	6,400	6,670	6,550	6,600
SOUTH AFRICA	3,369	3,723	4,012	4,164	4,216	4,282
China	118,000	139,100	140,900	158,920	171,000	185,000
Hong Kong	44	40	34	34	34	34
Japan	39,567	40,137	40,383	39,850	40,250	40,650
Korea, Republic of	6,574	7,204	6,919	7,145	7,500	7,800
Taiwan	4,298	4,400	4,450	4,500	4,500	4,550
OTHER ASIA	168,483	190,881	192,686	210,449	223,284	238,034
AUSTRALIA	3,210	3,238	3,286	3,468	3,540	3,710
WORLD 4/	514,021	541,656	536,196	551,914	567,297	583,718

1/ Preliminary. 2/ Estimate. 3/ Forecast. 4/ Totals includes 41 countries.

* U.S. G.P.O.:1991-281-074:40447/FAS

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